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Why *InterFun*?

THERE are magazines for coin-op; there are publications for the park rides industry; there are bowling magazines; there are playground monthlies.

So why *InterFun*?

It occurred to us that while we publish the world's most-read amusement machine magazine, *InterGame*, there is nothing which crosses all of the boundaries which are now coming together so spectacularly – but quietly – in location-based entertainment.

A family entertainment centre today is much more than rides and coin-op, usually indoor. The rides and games are often supplementary to other family amusements – or even the other way around. They can be laser tag, bowling, soft play, climbing walls, aerial adventure trails, wind tunnels, ice rinks, indoor slides, inflatables....a whole welter of 'miscellanea' which goes to complete a package of fun and games for the whole family.

They don't even have to be concentrated together as an anchor attraction to a major shopping outlet, although retail and leisure have such a wonderful track-record as dovetailing together. Some are stand-alone entertainment complexes that don't rely upon shopping to bring footfall.

InterFun is, therefore, intended to bring together all of these entertainment activities which are not currently specifically catered for in B2B publications.

They do the same job – entertain families – and therefore deserve the platform.

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Filling a gap in the market

ALES welcomes the new magazine

THE advent of a new magazine targeting the family entertainment centre (FEC) market is long overdue.

FECs were first introduced into the US about 30 years ago and, at one time, were hailed by the *Wall Street Journal* as being "the business to be in".

Its concept has, however, taken many years to extend to the UK and mainland Europe so the birth of *InterFun* is to be welcomed as it will provide an important vehicle for those wishing to learn how to make the most from this potentially rewarding business.

Currently there are a number of outlets in the UK claiming the FEC title but, in the main, most are based on the provision of play areas for children rather than the inclusive "family".

Conversely the closest facilities to the basic concept are farm attractions, most of which provide activities that all members of a family can take part in or use. It is one area of the attractions business that, to date, appears to be unique to the UK.

However, over the past few years, many theme parks have also recognised the advantages of including a section devoted to facilities which enable all family members to participate in a number of activities, which can range from go-karting to bowling, play areas and amusement-only games machines.

Education in the setting up and operation of a successful project is another area that a specialist magazine will be able to offer using its links with the many individuals and organisations who have grown up with the industry over the years.

Suppliers too, such as those members of the Association of Amusement and Leisure Equipment Suppliers of the UK (ALES-UK)



The Doctor Who Experience



ALES members Rainbow Productions developed these characters, Wenlock the Queen's Guard and Mandeville the Beefeater which were the London 2012 Olympics and Paralympics mascots

whose products and services are well attuned to the FEC marketplace, will welcome the opportunity to be involved in the development of the industry.

The Association was founded in 2004 and now comprises more than 50 UK companies which supply a wide range of products and services for FECs, visitor attractions, play centres (both indoor and outdoor) and amusement parks.

It is now one of the largest manufacturers and suppliers trade associations in Europe and works closely with many other national and international associations such as the European Showmen's Union, IAAPA Europe and the World Water Park Association, dealing with many shared important issues such as safety and protection of intellectual property rights.

While the majority of ALES-UK members have a substantial presence in the international market place, the UK and Europe are important areas too. From the service aspects such as feasibility studies, financing, insurance and safety inspections to products including simulators, ticketing systems, animated figures, character costumes, kiddie rides, shooting galleries, indoor and outdoor play equipment, slides, inflatables, adventure golf and timber play structures ALES-UK members are in a unique position to supply and support FEC development.

Among its many initiatives during its 10-year life was the bringing together of 11 international trade associations to find a means of combating the proliferation of imitation products, mostly from the Far East, the effect of which has seen a dramatic fall in copied products, mainly sub-standard products, being displayed at the main industry trade shows.

A founder member of the Amusement Industry Council of Europe (AiCE) which involves collaboration with the manufacturers and suppliers associations of Spain and Italy, there has been a recent link with other European trade bodies aimed at protecting the interests of their members and the industry generally.



Gerry Robinson (left) with Yuri Kuznetsov, the first President of RAAPA, celebrating 15 years of Gerry's involvement with the Russian show

Since 2008 ALES-UK has organised and presented the educational seminar programme for the Dubai Entertainment Amusement and Leisure Expo (DEAL) which, since its launch in 1995, has been the focal point for the MENA region and its huge FEC market.

More than 500 delegates have attended FEC dedicated presentations in that time and plans are now in place to introduce a similar seminar programme in the UK during 2014.

2012 witnessed the launch of another initiative, the Middle East Safety Forum, which has brought together authorities, operators, inspection bodies and others who have a direct interest in ensuring the implementation of internationally recognised safety regulations relating to the operation of amusement rides, inflatables and play equipment.

The Association is fortunate to have a wealth of talent and experience within its membership and is looking forward to working with the publishers of *InterFun* to place that expertise to the forefront of FEC development in the UK and Europe.

InterFun has come at the right time and should be supported by everyone who has a direct interest in providing quality family entertainment facilities.

Gerry Robinson is the secretary of ALES-UK (www.alesuk.org) and was, for seven years, chair of the International Council for the International Association of Family Entertainment Centres (IAFEC).



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Nickelodeon Universe in the Mall of America

Putting fun into retail

Basis of business faces internet threat

THE very basis upon which live family fun in a social integration situation is based is under threat. It can be the only conclusion from the mass of global data surrounding retail trends... But it may be a very long way off.

Fun has a multitude of definitions, but for the purposes of this issue of *InterFun* manifests itself as a welter of entertainments associated with and inextricably entwined with leisure retail. It may be the loser with retail itself.

Perhaps that's a bit strong, for 'retail' will always be there, but retail in the sense of a shopper personally visiting an outlet rather than virtually doing so. It is the internet, or e-commerce, which poses the threat. If folk buy online they are not going to the shopping centre or the shopping mall – and therefore are not being exposed to the entertainment experiences therein.

The family entertainment centre (FEC) with its big rides, coin-op games, F and B facilities, plus the wide range of amusements which support them – or indeed, which they support! – such as multiplex cinemas, tenpin bowling, laser tag, playgrounds, climbing walls, aerial adventure trails, ice skating, go-karting, wind tunnels – face an uncertain future, although it should be emphasised that this may be some way off.

Meantime, the multi-trillion-dollar global retail business is slowly reshaping itself into a platform for 'fun', as retail moves indoors, merges into multi-unit conglomerations and represents itself as a shopping centre or a mall with varying degrees of razzamatazz depending upon whether its clientele is a local community or a prime tourist region.

At either end of the spectrum the entertainment facility has a growing involvement. Not all developers are convinced, but a growing number are, that entertainment is a necessary adjunct to the shopping experience, principally for the education, edification and satisfaction of the younger set which might otherwise view a shopping trip as less than desirous.



Michael Niemira

Data is at best fragmented. The US is best-served, as usual, with statistics, but CoStar, the commercial real estate company, has identified about 113,000 shopping centres in the US. Michael Niemira, vice-president and chief economist and director of research at the International Council of Shopping Centers (ICSC) in New York, told us that properties with some kind of arcade or FEC "capture the experimental element that many centres are striving for today."

He said: "As such, it is more likely in the future that this type of property will gain traction, either as a standalone property or as an entertainment wing of existing shopping centres. To be sure, the Mall of America (Minneapolis, US) might be an extreme case where family entertainment is quite integrated into the shopping centre.

"The big focus today in the industry is beefing up the restaurant and entertainment elements of centres since they attract people and families and those features are not challenged by e-commerce."

That is open to debate, of course, because if e-commerce expands and bites into the bottom line of shopping centres and malls, then by definition it could be argued it will threaten the family fun elements in the malls.

Cushman and Wakefield, the global commercial real estate company, reports that online retailing has been growing at an average of over 18 per cent per annum for the past three years while sales through other channels have risen by 1.3 per cent and the market share of online retailing is now at four per cent. The UK is ranked highest in the company's weighted index for online sales, followed by the US.

It warns that those who cannot adapt may be left behind, but for the moment, says the company, "the store will be a key part of the supply chain." States the company: "As consumer expectations change and the boundaries between virtual and real worlds blurs further, shopping centres will need to respond quickly."

It continues: "An increased focus on uses and formats that entertain and prolong centre use is also being seen, including more leisure and a bigger food and beverage offer."

The message is clear: entertainment will continue to provide an essential aid to shopping centres. The e-commerce threat is there and growing but global retail sales – according to Euromonitor – reached US\$14.5tn in 2012, an increase of 2 per cent over 2011 and non-store internet retailing accounted for just \$579.9bn, so the threat, while duly noted, remains a little distant.

It is interesting that Cushman and Wakefield, in its research publications, cites Intu as a suitable case study. This company is a shopping mall landlord, owning 16 shopping centres across the UK, including 10 of the country's top 25. It has laid emphasis on enhanced family dining experiences coupled with other means of keeping families within properties; including ski slopes, bowling, IMAX cinemas, aquariums and a Lego discovery centre. It is also an example of a shopping centre adapting to meet the challenge of the internet, with its own website linked to its tenant stores offering lines from those tenants which are not otherwise found on the floor of the store.

"The function of shopping centres as an experience-driven retail environment" features highly in Cushman and Wakefield's assessment of the global market in retail – and by association, entertainment within retail.

One of the world's largest shopping centre developers, Westfield Group, with 100 malls in the US, the UK and Australia, views its leisure and entertainment dimensions as vital, now increasing cafes, casual dining, extensions to provide large cinema screens, digital products, new lounges, child care, play facilities and gymnasias.

In terms of the penetration of entertainment within shopping venues, it remains a small percentage because of the sheer volume of shopping centres which opened prior to the rise of the notion of teaming shopping with other leisure activities. The level of new developments which are automatically including a variety of leisure pursuits is today a very high majority.

In this, the Middle East and latterly the Indian sub-continent are leading the way with virtually every new mall including some level of in-house entertainment, led by the multiplex cinema and FECs. But equally, soft play, bowling and laser tag are leading the trends. Of 400 major shopping centres currently under construction in India, for example, 380 contain some form of entertainment facility as an anchor attraction.

The key to it all is how it is presented, the content and the gift-wrapping of the entire package of amusements and entertainment. Anna Zykina Bacorn, vice-president of sales at Barron Games, the US and international distributor, said: "It is important to think outside of the box when reaching out to new customers and continue to evolve with the amusement industry. We are always looking to reach out to new markets and in the last few years we have noticed a substantial variation in the venues that our products are being placed. Families do not just want to go to a standard FEC, they want to get the entire experience when they go out. Our products have been placed in locations such as shopping malls, bowling alleys, laundry mats, and even airports internationally.



Lego store in The Mall of America

"Bowling centres is a huge new market for us domestically, that is continuing to grow. Owners are expanding their facilities to add more amusement games attractions to provide a variety of experiences to their customers and for them to return again. Shopping mall arcades are extremely popular internationally where everyone goes shopping at a mall and they are always busy! It is culturally accepted. The opportunities are endless! As long as there are people around to play, there is a place for an amusement game."

That pretty well sums it up. If there are people around with time on their hands and disposable income in their pockets, then the opportunities are there.

Bacorn – and the rest of the industry which supplies the fun to the operator, whether in a retail setting or not – will face the fundamentals of ensuring that the entertainment is available for the 'punter' wherever he/she congregates and assuming that he/she has resources.

Those considerations are basic. The fear is not the industry's ability to cater for those people, but whether the in-home attractions over the internet will entice them away from the desire to go out-of-home and congregate. With so much of what the fun business can offer being tactile, there is precious little opportunity for the player to try it through the surreal environment of the internet.

There's the rub for the fun industry. There is, however, little benefit in stressing about the long-term problems; there is too much here and now to be assessed first.

Interactive sports and simulation

SPAIN

RECENTLY opened in Zaragoza, Spain, Puerto Venecia is a spectacular shopping centre in a high-end mall and contains a family adventure park supplied by Prime Play to include a Sky Trail ropes course, Sky Tykes rope course an Adventure Trail and a FlowRider water feature.

UKRAINE

JUST opened is a new FEC at Kharkov, Ukraine, is one of the largest FECs in Europe with many attractions. It includes the first indoor adventure trail within an FEC to have trampolines built between towers. The Kharkov Karavan Mall includes ice skating and Igraland, the children's complex and a 13-lane bowling centre from QubicaAMF.

FRANCE

FRENCH company Imaginvest has opened a new FEC named Vitam Parc inside the Vitam Migos shopping centre at Annecy, near the Swiss border. The French attraction will include a Ballocity system from Prime Play of the US which will integrate with birthday party rooms. There is also an indoor climbing area with over 50 games including four slides.

Product

ITALY

COGAN of Italy has introduced the Cars Double Race, a licensed ride based on the Disney-Pixar Cars movie. The twin ride has two coin mechanisms and two cashboxes so that they can operate independently of one another, but equally they can operate in their own race. Each comes with racing music, lights and sound effects.



The Big Thrill Factory at Minnetonka

Product

UK

CASH handling solutions specialist Thomas of the UK has introduced the Ticket-Station. The Thomas 8010 is a prepayment machine issuing an unlimited number of tickets for events and attractions or for the exchange of goods and services. The reliable and secure cash handling system it contains means that the sale of thermally printed tickets can be automated, cash in and change out and there is a chip-and-pin facility for credit cards if needed. It contains a PlayStation Management Zone, giving locations audit facilities.



Outdoor play

ITALY

ITALIAN company Legnolandia of Forni di Sopra has developed its own range of playground designs under the generic name Trees. The play structures have a tree as the main element and backs the company's ecological principle of "CO2 no thanks". The range includes real tree houses with a wide platform and different degrees of accessibility and height from the ground, skill challenges and a high fun element. Only timber from 'zero kilometer' FSC and PEFC certified forests is used and the company has reduced its CO2 emissions in its production to almost zero.



Interactive sports and simulation

US

THREE new QubicaAMF bowling centres in FECs have been opened in the US. The V, with 16 lanes and four VIP lanes was opened in Omaha on July 11 following a soft opening on June 14. The location also includes a restaurant, arcade and laser tag. The bowling equipment include Xli EDGE pinspotters, the new BES X entertainment system and Glow Track Lanes. Also new is the Good Times Olean, at Olean, New York, which had a grand opening on July 18. It has 16 lanes including the new BES X system, three restaurants, arcade, mini-golf, batting cages and volleyball. The Big Thrill Factory, an FEC with eight lanes also opened recently at Minnetonka, Minnesota. It also has three restaurants, bumper cars, ropes course, laser tag and outdoor attractions.

US

THE world's only 'bowler entertainment system' BES X from QubicaAMF maximises those elements which are fun to players. It creates more fun, encourages socialising and also increases the competitive edge. There are 18 different environments – some of them exclusive, such as You Toons with 1,000 different animations and 26 games as well as the shorter Mad Games, all of them coming from the bowler console. The new Facebook GameConnect enables players to 'like' or 'check in' at the centre and publish games directly to Facebook. There is Adaptive Skill Level Games for less accomplished bowlers where they can win against experienced players. There is even a Virtual Waiter which enables players to order food and drink from their console to be brought to their lane.



Events

US

THE IAAPA show (Orlando, Nov 18-22) has released details of its special events and networking programme. It includes several tours of Florida amusement parks but also a visit to Fun Spot America, a local FEC which has recently been rebranded and which is currently in the middle of a US\$20m expansion plan.

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Product



UK

KIDDIE ride maker Northern Leisure from the UK has launched Olly the Little White Van, a small-footprint single seat ride licensed from the children's TV series. It only uses 0.76sq.m of space and features the programme's theme tune and the voice of TV personality Justin Fletcher. The dash has a steering wheel and push-buttons to trigger Olly's voice.

SPAIN

WHAT amuses and delights the kids of today has changed thanks to the development of new technologies. What has not changed is the thrill of winning thanks to skill and ability. Developers have taken time-honoured games and brought them up to date for today's world. Take, for example, the Micro Bowling game, from Diana Marketing of Spain, played on a machine only 180cm long but with onscreen visualisation of a full-size lane. Advanced computing and the use of laser sensors is suitable for up to eight players who can choose bowling or six other exciting and unique skill games. The Galaxy online darts game from the same company is played using plastic points darts and through an internet connection allows the players on one machine to select opponents in other regions or countries and challenge them to a match, played in real time and made friendly and visual by the cameras mounted on the machine. Both these machines can be installed on free play or coin operated. The company has a complete range of support products for our games and are backed by 30 years of experience.



Snow Village,
Saudi Arabia

US

A SENIOR and junior air hockey pairing comes from Barron Games of the US. The Galaxy Collision QuadAir is a multi-player air hockey for two-to-four people using up to three pucks at a time. It features goal gates which drop down when each side is credited. The QuadAir Jnr is the baby brother with a fun jungle theme. It is a multi-player air hockey for smaller players and has all of the features as the QuadAir but in smaller sizes. It can be customised to the location.



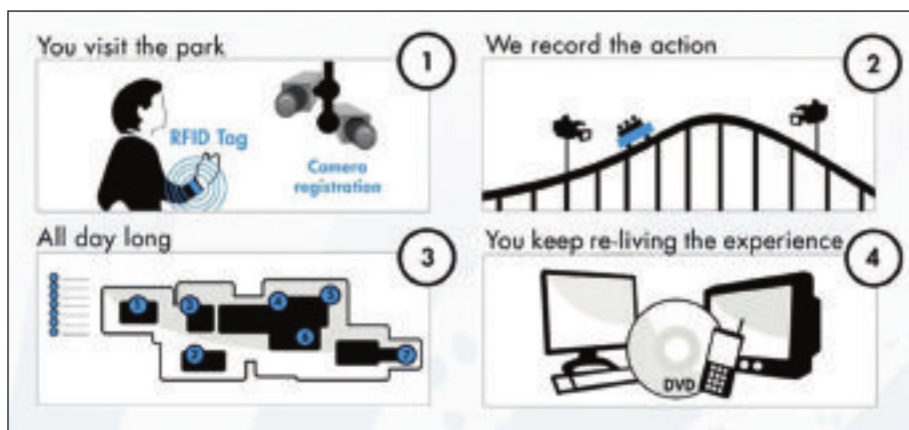
Interactive sports and simulation

NETHERLANDS

AMSTERDAM-based Unlimited Snow is stepping up its installations of synthetic snow and ice attractions for amusement parks and FECs. The company has undertaken a number of turnkey projects using a team of specialists. The most spectacular has been the Snow Village, a new generation ice and snow amusement park at the Mall of Arabia, Jeddah, Saudi Arabia (pictured as a concept).

AUSTRALIA

CLIP 'N Climb, an Australian-based developer of climbing walls, has launched Twister, a new challenge with a patented device to replace the attachment system between the auto belays and the climbers (see page 34).



Interactive sports and simulation

NETHERLANDS

TAPEMYDAY is something really new for amusement parks and larger destinations. The Dutch developers have presented it as a track and trace visitor video experience. It combines off-ride and on-ride state-of-the-art filming technology which will track and trace people even in a disorganised

environment. The personalised guest video will cover an entire stay in a location and will generate additional revenue through sales of films and commercials. Visitors can download their videos from a website and the system will provide the location with valuable data for marketing and promotions. The first TapeMyDay installation has just been completed covering a water park, De Tongelreep, in Eindhoven, Netherlands. The developers are now finalising agreements with parks and attractions in Las Vegas, Saudi Arabia, the United Arab Emirates and France.

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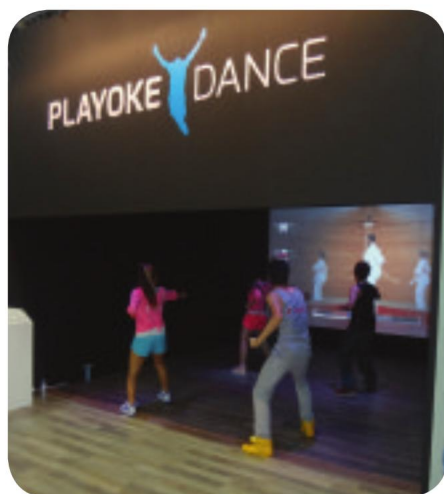
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Interactive sports and simulation

AUSTRIA: DANCING AND LEARNING

Austrian company Attraktion GmbH is distributing something very new in entertainment for all ages. The Playoke Dance system puts all age groups into a mini-studio for dancing and edutainment sessions before a giant video. "Previously it was only possible to play virtual games at home, but now we have an interactive game for high-footfall locations. Your visitors become part of his new, multi-sensory experience and they are engaged in a new virtual world," says the company. Playoke Dance permits players to compete against each other in real time, following virtual leading dancers, mascots or instructors who perform in front of the players – and the players try to imitate their steps and movements. It becomes a challenging group battle and therefore an entertaining game. Players log in and enter the game by raising their hand as a photograph is taken of each detected player. They are animated by real-time feedback through 3D motion tracking on their dancing and performing which is compared with other players and points are awarded. The location's own mascot can be animated into the system while the edutainment benefits include all kinds of instructional games such as a flag alphabet and role playing. The size of the unit is from four participants upwards and is custom-built to fit the location. It is designed for anyone from six years up and is targeted at indoor amusement venues, FECs, science centres and museums, theme parks and shopping malls.

US

A MARKETING idea...sponsoring a local morning TV show...FlipSide, a 50,000sq.ft. bowling and entertainment centre at Phoenix in Arizona, US, had a five-minute segmented presentation on the local ABC affiliate. FlipSide has bowling, bumper cars, soft play and an arcade among many attractions, as well as a 30-player Nexus FEC in a two-level arena.



Product

BELGIUM: CAPSULES ADD VALUE

BULK vending is an essential aid to any entertainment and amusement experience and Charlier-Brabo Group has been delivering the service for over 50 years. Toys, gadgets and confectionery are the primary products dispensed in the company's venders, distributing from warehouses in France, Belgium and the UK all over Europe. Millions of items go through the venders each year and some premium names are exclusively sold this way, including Zed Candy bubble gum, Tomy licensed capsuled toys and Perfetti-Van Melle bulk products. ToyVend is a Brabo subsidiary in the UK and is the country's longest-established supplier of sweet and novelty vending machines. It also handles Beaver vending machine in the UK. ToyVend's capsules range from 35mm to 100mm and may contain bouncy balls, bubble gum and sweets and some licensed names include Toy Story, Cars, Disney, Smurfs and others.



Interactive sports and simulation

UK

FRESH on the success of its artificial caving concept, Hangfast Climbing is not forgetting its roots or the products which first brought it international recognition. The company is now installing the next generation of its Clip 'n Climb product, the Vertical Playground. It is going into a new location in Yeovil, in the UK's West Country. The Vertical Playground is fully interactive, using sounds, lights and animated graphics and interfaces but also has an educational twist. For example, the player can climb the planets in order or historical structures such as the Easter Island 'heads' or Egyptian monoliths.



Soft play

US: DRAWING ON EXPERIENCE

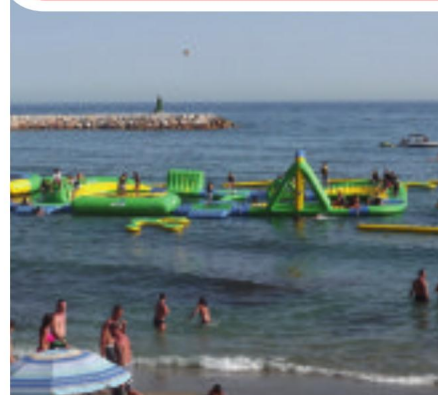
CRAYOLA, the noted manufacturer of children's crayons and drawing implements, has installed a major new soft play attraction at its Crayola Experience in Easton, Pennsylvania, US. Prime Play supplied the attraction as part of the Experience's major renovation and it opened on May 27. The custom-designed soft contained play structure surrounded the iconic branding of Crayola and featured a climbing structure and many play elements. These included a unique suspended bridge and tube crawl over a Crayola-inspired chalkboard floor play space. There is also a giant crayon tower and a Pip Squeak Marker slide. Crayola Experience has 21 unique attractions on four floors, plus a café and a Crayola outlet store. Crayola is a subsidiary of Hallmark Cards.



Outdoor play

SPAIN

SOMETHING new for the Marbella waterfront. The famous Spanish resort now has a Wibit Sports floating inflatable gymnasium moored just off the beach. A series of water features are linked together to form a continuous exercise and fun platform. Wibit Sports is a German-based manufacturer of water play products.





Stairway To Heaven

Interactive sports and simulation

AUSTRALIA

AWARD winning Clip 'N Climb continues its global roll-out in 2013 with new facilities either opened or soon to open in Spain, Germany, England, Ireland, Canada, El Salvador, Israel, Cambodia, Australia and the US. The original Clip 'N Climb in Christchurch, New Zealand, which is still owned and operated by the company, is having its best year of trading since first opening its doors in 2006. Winning a Best New Product award for Stairway To Heaven was the icing on the cake for Clip 'N Climb in 2012 and the company hopes that its creativity and originality will bring it more industry recognition again this year.

UK

SEVEN hundred installations of synthetic ice rinks down the line, Ice Magic International of the UK, with a network of international distributors, has now spread its product base wider with roller



skating. After 14 years in the business, installing bespoke permanent rinks and temporary sites, Ice Magic has formed Roller Magic, which as its name implies, is a roller version of the same pastime. Roller skating, says the company is the biggest craze to hit Europe and it can be installed and operated on any surface indoor and outside. The Roller Magic rinks, which can work as either permanent or limited run attractions, are made up of one metre square sections of plastic which interlock to form a seamless, low-friction skating surface. The latest version is Silent Roller Disco, where the skater uses headphones to hear pre-planned music or tunes from a DJ. The company sees its potential in shopping centres and late night entertainment and actually transmits two live music channels so that guests can choose which they want to listen to.

US: TIPPMANN TOPS 100

THERE are now over 100 Tippmann laser tag systems being used globally. They are in Canada, Austria, the UK, France, Spain, Netherlands, Denmark, Belgium, the Czech Republic, Morocco, Paraguay, Namibia and Singapore – as well as the US. Tippmann's laser tag system is a fun, portable and affordable way to offer customers an indoor or outdoor laser tag experience. The new revenue stream benefits fun centres, family parks, mobile games businesses and rental facilities seeking to add laser tag at affordable prices. The system is easy to set up using gun-to-gun or by using the Command Center Module – the facility can set up and play 100s of different games for all ages. The most popular version is the Barracuda which is totally electronic and designed mainly for rental facilities, mobile game business and FECs. Tippmann is also offering the iCombat Tactical System which takes laser tag to a new level and includes the gun and a vest and headband system for real-style combat missions. It is ideal for locations seeking to expand their indoor laser tag programme or for parks looking to cater to the growing scenario of laser tag adventure.



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Cogan's Batmobile, one of the latest rides

DAVID Robinson of World of Rides has no doubts: "You can look at coin-operated children's rides or battery cars, which is one of our specialist areas. They are more recession-proof than other amusements. Money may be tight for parents, but children will still get treated to a ride when they spot an attraction, while at the other end of the leisure scale the parents may resist playing machines in order to conserve their spending money."

Battery-powered rides have therefore become major money-earners for operators and have actually become attractions in themselves, bringing families into FECs and arcades where they are located, specifically to ride the devices, "where otherwise the families may have resisted the temptation to enter."

Robinson firmly believes that rides mix well with other types of machines to provide a good, overall family environment within a seaside location in particular, but he notes that they are now so far advanced in their development that they can stand alone in any environment.

"Much of our own development work has been in response to specific requests from customers and the outcome has been to elevate the earning potential of the equipment. Styles and content have changed with more interaction between rider and ride."

The age group, he said, remains between three and 12 years, but Robinson had noted that the children, even at such young years, had become 'more technologically savvy' and they demand rides which are both competitive and which demand concentration.

World of Rides also supply their own bumper boats for water-borne amusements which are located within FECs along with go-karts and 'trikes' and there is a demand for rides which can be used simultaneously by parents and children. There is greater use in locations such as farm parks and holiday parks where there are often lakes on site and there is a tendency to market these locations as family 'health and fitness' centres. The pedal-powered Hydrobikes fit well into this environment.

Robinson insists that the ROI on battery-powered attractions will surprise operators. "They often out-perform video games by some margin and ROI within three months is not uncommon. On average customers report that a site will earn 90 euros to 115 euros each day, mostly through multi-use rather than footfall."

He is now seeing more use of battery-operated children's rides in retail locations and developers are deliberately targeting children in their shopping centre plans.

Six months ROI on rides

A RETURN on investment in as little as six months, but not more than 12 months – that's the prediction of Marco Francioni of Cogan rides in Italy, talking to us about the profitability of children's rides.

The company specialises in coin-operated rides for one or two passengers and emphasised that, outside of theme parks and the big rides, versatility is the key word. A ride, he said, had to be capable of being operated anywhere – as long as there is a source of power. "But operators are looking for something nice, attractive and reliable, apart of course, from making money." The location, he said, was critical, but a prudent operator could get an ROI in 6-12 months. "Frankly, it can sometimes be shorter – but also sometimes longer."

There remains a skill to operating rides, selecting the right position even within a location, and adjusting the price of play to local circumstances and the duration of the ride. "A good mix of rides is also important and a competitive price. Key to the location is a fast maintenance service from the operator."

He noted that in the current market, more 'bells and whistles' were needed on rides to attract an ever-more-discerning youngster. "Rides need to be different, more interactive." The use of rides is becoming more imaginative, said Francioni, and he noted that in some countries they were being tried out in locations not yet experimented with in other countries. Even soft play locations were trying them.

Super Bike trike from World of Rides

Children's rides drive revenue

The recession has demonstrated the value of children's rides as an enduring attraction with a built-in longevity far in excess of other entertainments which may be more prone to faddish boom-and-bust influences

Revenue from a small space

THE beauty of coin-operated kiddie rides is their ability to generate revenue from a very small space. Gareth Jones, production manager at Northern Leisure, the UK-based ride manufacturer, said it was this versatility which had led to kiddie rides being utilised in almost every conceivable location.

"Just about any business which has a footfall of children can take up the opportunity, from small shops to large retail outlets, supermarkets, FECs, play areas, arcades, the list goes on and on. Many rides take up little more than one square metre and in some cases single seat rides can take up even less.

"However, you do have to ensure that there is enough safe clearance around the ride. We recommend a two-foot clearance all the way around to ensure that there are no trapping hazards or obstructions."

Jones feels that an operator can get his return on investment very quickly, depending upon the location and the ride and how the machine is operated can also be a factor. "By this, I mean that if an operator owns his site and ride then he will obviously reap all of the benefits and the revenue from the cashbox, resulting in a fast ROI. But if he is operating in someone else's site on a profit-sharing basis, then it will take longer."

Some people simply begrudge parting with anything more than pocket change. The industry standard and average run time for a ride is 90 seconds. This is short enough to keep the child entertained throughout and long enough to be standing waiting, as a parent

The skills in operating a kiddie ride, he says, are fairly basic. It is a case of 'location, location, location', as usual, but good visibility and footfall are essential, while price of play is a factor. "Some people simply begrudge parting with anything more than pocket change. The industry standard and average run time for a ride is 90 seconds. This is short enough to keep the child entertained throughout and long enough to be standing waiting, as a parent."

Technology is also important. Kids, says Jones, are evolving alongside technology so the manufacturer has to evolve too. "A three-year-old can easily navigate a touchscreen tablet and a mobile phone these days so they are used to stimulating their play through technology. For this reason, we are now seeing rides with video screens, interactivity and touchscreens. However, this doesn't always make the ride perform better in terms of revenue.

"The most powerful tool a child possesses is imagination. If you can capture that then the ride will be a success. A good licence can also be a key. If a child sees their favourite TV character on a ride then they will want to ride along with them, regardless of gimmicks and gadgets."

In the case of Northern Leisure, this is the reasoning behind its new Peppa Pig Car – a natural fit in soft play centres which are increasingly becoming a popular location for kiddie rides.



Joey JCB is a new kiddie ride from Northern Leisure with a 17ins touchscreen monitor to choose a video containing footage of the JCB at work. Push-buttons play phrases and there are two joysticks triggering genuine JCB sounds.

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Venetian Carousels



Andy King with his family on his wife's birthday. Left to right: Nicole (12), James (five), Andy's wife Cynthia, Marcus (nine), Andy and son Thomas (two).

Fun in Indonesia

A family entertainment location without coin-operated and electronic games... A bold concept, and one which many might suggest is risky. But not for Andy King, an ex-pat Briton living in Indonesia



HE runs two locations, the flagship Cartoon Kingdom in the city of Surabaya and Bubbles, a smaller location in Pasuruan, about 1.5 hours out of Surabaya.

They operate under the company name Cipta Baru Nusantara, which literally means 'helping to create a new exciting archipelago'.

His Cartoon Kingdom has a huge indoor play centre with a toddlers' area catering for 250 children at any one time and a seating capacity of 100. Around the perimeter he has nine shops selling a variety of food, hairdressing salons, reflexology, a coffee shop, kids' café, children's photographer and a party room.

Said Andy: "I specifically stay away from the coin machine industry because I think that there are far too many electronic gadgets that kids use in today's society. I concentrate on children's exercise. I want kids to give their electronic gadgets a rest and work their hearts and lungs, doing some old-fashioned exercise like running, jumping, climbing, swinging and sliding. In this day and age, without indoor play centres, we will see a huge increase in child obesity world-wide."

Andy's offbeat – but laudable – operating principles make Cartoon Kingdom a focus of considerable attention by those who, rightly or wrongly, assume that electronic games and redemption are an indispensable factor in an FEC.

It all appears to be working for Andy. Due to the intense tropical heat in Indonesia, the

air-conditioned malls seem to be the place where families escape or run to, which is good news for the local amusement industry. "The economy in the city of Surabaya is improving and malls are springing up like daisies, which in turn attracts more children's entertainment and leisure facilities."

He feels that the biggest challenge to operating children's amusements today is keeping up with new and modern technology. "We can draw similarities with smart phones as new and ever more sophisticated models continually appear. FEC operators may invest this year and perhaps their new products will be out of fashion within one or two years, which means we need a fast ROI. If one operator doesn't go for it and invest in something new, you can guarantee a competitor will."

Andy travels to the large number of trade shows around the world now catering for FEC operators to seek new games and new entertainment ideas. "It's my job to introduce new and exciting trends to all corners of Indonesia if I can – and there are a lot of corners in this country!"

His travels and investigation into new ideas suggests to Andy that China is currently the most pro-active developer of new ideas for entertainment and amusement in FECs.

Andy's own introduction to the industry came by chance. He met his wife-to-be in Indonesia in 1997 and they married in 2000. He was in the country at that time setting up

health clubs throughout the region, having served with the Royal Marines previously. Moving slightly off the mainstream health and fitness regime, he began to introduce fitness locations for children in Surabaya and it grew from there.

A major influence was Nick Balmforth, author of Indoor Play Safety and Risk Management, who is also a director of the Play Inspection Company in the UK. Andy also underwent some courses at RoSPA (Royal Society for the Prevention of Accidents). The accumulated knowledge was put to good use on site in Surabaya with a simple indoor play centre which exceeded all expectations... And the FEC followed.

In addition to his two locations, his company also installs indoor and outdoor playgrounds throughout the country, offering a full turnkey solution from site evaluation to post-opening hand-holding.

His philosophy for that sector is the same as for his own operations: "My customers regularly return to Surabaya and we meet for coffee or meals; they become friends, not just business colleagues."

Andy has a unique and very effective testing team of specialists who try out rival FECs and attractions, providing valuable feedback. They are his daughter and three sons. "They are my testing agency. They will tell me how clean/dirty other play centres are, what's missing, what's good as well as comments like 'Dad, get one of these it's awesome!'"

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A new way of thinking

SL Kids' Nick Chandler tells **Simon Liddle** about the exciting opportunities out there for free-to-play amusements

WHAT if – and bear with us here – we stop thinking solely about coin-operated amusements and start considering instead the possibility of introducing non-pay-to-play amusement experiences. What benefits would that bring? In locations where amusements are a subsidiary to an anchor attraction, say in a pub or a retail outlet, could offering something extra for free increase dwell time and potentially lead to additional purchases?

It's not an argument that is easily won with someone for whom coin-op amusements are a deeply entrenched part of their business. After all, coin-op machines provide a steady revenue stream that can be easily quantified. Yet for those new to the 'play' industry or those operating locations outside the traditional

realms of pay-to-play amusements, free-to-play games are becoming an increasingly important consideration.

It is a growing market that is a key priority for SL Kids, part of the Sound Leisure group of companies based in the UK. Under Nick Chandler's leadership, SL Kids is rapidly expanding its product range and presence within the leisure market. From its headquarters in Leeds, Sound Leisure has built a reputation for manufacturing jukeboxes that are among the most iconic anywhere in the world. Its manufacturing expertise doesn't end there, however, as a stroll around its 90,000sq. ft production facility demonstrates. Aside from jukeboxes and coin-op redemption games, the company is called upon by a host of different industries to produce items as diverse as motorcycle mudguards and bank cashier trays.

Having developed a wide skill set and a broad customer base over several decades, the company's children's play solutions division



is now opening up new avenues for the group. As the exclusive UK distributor for specialist Dutch manufacturer Instore Kids Corners, which offers compact, modular and scalable play solutions, the company combines the latter's product range with its own custom design and manufacturing capabilities to offer a comprehensive portfolio of play products. Add to this the company's interactive environment controller Sound Stage and the controller-free gaming solution Captivator 360, and you begin to see that it is in a unique position to cater to a wide customer base.

“We have to choose very carefully the markets we look into and, having expanded as well as we have in such a relatively short space of time, ensure that we continue that growth”

“The potential here is enormous and we've hardly tapped the market,” Chandler told *InterFun*. “We have to choose very carefully the markets we look into and, having expanded as well as we have in such a relatively short space of time, ensure that we continue that growth. We are continuing to expand the range, improve the products, expand the client base and expand our reach.”

What SL Kids specialises in is providing play solutions for children between the ages of 18 months and 10 years in locations where they can be left alone for a short period of time, while their parents are “doing whatever it is they need to do.”

Explained Chandler: “That can be in places as diverse as public houses, car showrooms, shopping malls, airport terminals, cross-channel ferries – it really does go right through a spectrum of outlets, where these products have replaced



the constant desire of children to put a coin in a slot. That is a very important aspect, particularly in today's climate."

The appeal for parents, he said, is that their children are able to play games without further cost to themselves. This can increase dwell time in pubs, for example, which may in turn lead to more food and beverage sales for the location. It also reinforces the message that this location is one that provides better value for money for families.

Captivator 360, for example, is designed to provide a simple and cost-effective way of securely mounting an Xbox 360 console, Kinect sensor, controller and flat panel screen in a single, compact space. This opens up new opportunities to offer controllerless gaming – popular in the home market – in a variety of public locations. Unlike previous attempts to offer game consoles in pubs, for instance, Captivator ensures that all the necessary components are accessible only to members of staff and are therefore not at risk of being damaged or stolen. Crucially, because it enables operators to choose the games they offer, they can cater to different audiences.

Thanks to Sound Leisure's manufacturing expertise, meanwhile, SL Kids is able to provide custom designs alongside its standard line-up of children's products.

"Once we talk to a client and they open up and tell us what they really want, we can turn our hands to anything because we have a team of extremely well trained designers, engineers and production personnel," said Chandler. "We have a fully operational woodwork and metal shop here and we have some people with fantastic imaginations who are not afraid to ask the questions. Where we have an ever-decreasing market for our mainline products, we have another increasing market for gaming systems and, in particular, those that do not have a coin slot."

There are none of the regulatory and licensing issues associated with coin-op equipment, with the exception, of course, of licensed brands. Even here, if a client can demonstrate evidence that they hold the licence to a brand, SL can produce "just about anything."

"There really are no limits to what we can do," added Chandler.

More and more pubcos, retailers and entertainment locations are seeing the benefits of providing free-to-play children's equipment, including family entertainment centres, though Chandler admits it can be an uphill struggle convincing some operators to look beyond the concept of machines generating revenue directly.

"We will always continue to concentrate on the biggest market sector, which is pubcos and FECs, though the FECs take the most time for the smallest return," he said. "That

is because they still like to hear the sound of a coin dropping into a slot. That's not surprising when you consider that for many it is their raison d'être. If you go into an area that is full of machines of some sort, be that a 5D experience, a bowling alley or the latest Pac-Man machine, everything has a coin slot. We believe there are different ways of FECs operating; you can have a mix of coin-op and non-coin-op.

“One of the things we firmly believe is a good thing to have is an area that is based on soft play for younger children to keep them amused for a short while and gives them a degree of education, which our soft play products do”

"One of the things we firmly believe is a good thing to have is an area that is based on soft play for younger children to keep them amused for a short while and gives them a degree of education, which our soft play products do."

There are also opportunities to utilise the company's Captivator product within this type of location. The company is "totally convinced" that its products fit well within the FEC concept, Chandler continued, noting



that momentum is building behind the notion of offering free-to-play amusements in a host of locations.

"Elsewhere, where historically there has been some form of entertainment going on as a subsidiary to the main event, which may be eating, shopping, or the cinema, we have seen the beginnings of a deliberate choice to offer non-coin-op.

"There are a variety of different entertainment centres just adding a little touch – just a freebie here and there – and we're just starting to see that happen. A wider world is definitely opening up."



Nick Chandler, (left) and Nigel French, national sales/business development managers at SL Kids



A QubicaAMF bowling installation

The classic anchor

Developers of shopping complexes will look carefully at ypsf (yield per square foot), comparing potential rents for each unit within the centre balanced against the intended use for the unit. Most will, of course, be retail and the developer will negotiate with one or two major stores to anchor the shopping facilities and build in the smaller businesses around the anchors

THERE are other facilities of which he has to be mindful, of course, the restaurants and coffee shops, the car parks, the service areas, all of which will not necessarily yield as well as retail, but which could be considered essential to the overall mix.

Most, if not all, will also give careful consideration to entertainment. It isn't rocket science that those who go to shopping centres or malls are intent on a leisure activity. Shopping is without doubt the biggest factor in this, but the accompaniments to this activity, such as food and beverage and entertainment, will be considered vital.

The entertainment can be largely divided into two; major attractions in the form of multiplex cinemas, ice skating, tenpin bowling and secondly the FEC or family entertainment centre. The latter will contain the rides and the coin-operated games. There are often associated entertainments which in terms of size fall between the two, such as soft play, laser tag, climbing walls, aerial adventure trails, playgrounds, 4D or 5D theatres or any of a range of other larger attractions.

It is how these different components fit together and whether they will compete for the leisure spend that is critical to the investor or the developer or the FEC operator himself.

Most will agree that to a large extent they are complementary rather than competitive, as they form definite mini-destinations in themselves.

If there is a standout element within the offer it is probably tenpin bowling, as it

combines two disciplines, fun with a recognised sport. It is how this attraction will fit with the other segments in a development that is the key consideration.

"There is absolutely no doubt that bowling is most effective when combined with other revenue generator activities such as a mix of games and is in itself an anchor for an FEC.

"Traditional bowling centres with only bowling on a large footprint and a vending machine for drinks and snacks are a thing of the past. In many international markets the whole concept of bowling was always perceived to be a great attraction, a novelty that was part of the entertainment mix, offering at the same time a sport alternative.

"Today, bowling centres are always designed to be full entertainment complexes, offering a wide range of activities." The view is from Adam Steinberg, CEO at Embed, the debit card systems supplier. It probably sums up most adequately today's inseparable inter-dependence of bowling with a general leisure offer within a retail environment.

If the FEC or multiplex is an anchor entertainment attraction for a shopping development, then equally a bowling complex is an anchor to the FEC. All of these activities dovetail naturally with one another to provide an overall entertainment offer.

Talk to the big suppliers of bowling, companies like QubicaAMF and

Switch, the Swiss-based specialists, and a picture rapidly emerges of a well-established – indeed thriving – pastime for which games are an add-on rather than the other way around.

Research which we have carried out recently shows that tenpin bowling today is present in virtually every market of the world. The number of lanes existing total around 220,000, a little over half of them in North America where the average installation is of 23 lanes, while those in other countries tend to be smaller at 12-14 lanes. There are about 5,000 bowling centres in the US alone.

Companies like QubicaAMF and Switch sell more four, six and eight-lane bowling centres in the rest of the world than would be sold into the North American market. Those are the only real differentiators between North America and the international market, although of course the former is on balance an older installation than the business in other countries.

The global business is 'worth' about US\$9bn annually, which means the value of new installations (outside of the US) and upgrades (inside the US) generally, plus the operating turnover.

When we talked with Ron Wood (pictured), senior vice-president of international sales at QubicaAMF, he revealed a fluctuating market. Compared with 20 years ago, tenpin bowling has shown remarkable growth, but there has been a hiccup in the past seven years. This would fit neatly with the global recession, especially as the



Ron Wood, senior vice-president, international sales, QubicaAMF

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downturn is now almost totally recovered. "Yes, it fits neatly with the recessionary effects which set in at the end of the last decade," said Wood. Interestingly, he said that the number of players had actually seen a slight drop in recent years, but that the spend has almost doubled.

Over the years the standalone bowling centre has gradually evolved into one more dependent upon mutually-supportive entertainment. Today's tenpin bowling location is more likely to be adjacent to a multiplex cinema and inside the food and beverage sector of a leisure installation; it may well in itself form an FEC with accompanying attractions such as softplay, games or laser tag.

The importance of the family fun elements in what has often considered itself a very serious sport, is not to be under-estimated. QubicaAMF recently sent a top-level support team around the world for two months to introduce its new BES-X system of software. This effectively revolutionises the way games are played for fun, adding features, fun environments, family formats and some very clever novelties to make the bowling offer more appealing to the less serious player.

At Switch, the rapidly-expanding Swiss-based supplier, Alain Winterhalter, international CEO, agrees that the global business slowed perceptibly during the financial crisis. "In the past five years new openings were

seriously affected by the situation. The economic recovery is showing strong signs of happening and now bowling developments seem to be taking place in conjunction with shopping malls, sporting complexes or private compounds; they all need time to be developed and built so there is a natural time-lapse.

"Existing facilities were slow to invest in modernisation and as a result suffered a decline in revenues, while modernised locations provided a much more appealing environment and benefited from the clients' carefully spent disposable income.

"We have held our own during these challenging years, implementing a well thought-through restructuring plan and we are now more than ready to take full advantage of the economy's recovery."

The conclusion from the specialists is that bowling has a healthy future. Much of that conclusion is based upon new technologies leading to new ways to make bowling a fun occupation. QubicaAMF, for example, is so convinced that its new BES X system is going to rule the international roost – and it is certainly shaping up that way – that it has pulled out of takeover talks which would have brought it out of Chapter XI bankruptcy. They only see onwards and upwards as the incoming philosophy. The same picture is emerging from Switch with its major new changes.



Highway 66

B RIDGING the gap between full-scale tenpin bowling and coin-operated games is Highway 66, undoubtedly the most notable of the 'cut-down bowling' games currently available in the market place.

The unique QubicaAMF product has the extra ability to fit into locations where the full-scale game cannot go for logistical reasons. It is therefore commonly seen around the world in FECs and arcades, but for all its reduced size, Highway 66 remains a game of skill and the techniques used to successfully play it are entirely different from the full-sized bowling game.

QubicaAMF itself regards its mini-bowling game as a high-earning supplement to coin-op and rides in a location. Says Dorman Spencer, the amusement sales and new facility specialist at the company, "it can be compared with mini-golf or bumper cars. Mini-bowling is an oversized arcade game, rather than an attraction."

With over 1,000 Highway 66 games now in operation around the world, the product is without doubt the premier mini-bowling game on the market.

Highway 66 is, says Spencer, definitely a stand-alone product for amusement and entertainment and it has the added benefit that it will encourage children to elevate to the full-scale game. It is also important to look at its ROI potential when compared with other entertainment with a similar footprint. "Highway 66 equals and sometimes exceeds other coin-op games in revenue per square foot, but irrespective of that, Highway 66 – indeed, mini-bowling as a concept – is essential to a location because it provides variety on the floor."

The interesting point about mini-bowling is that it works well in other locations alongside other attractions, notably with multiplex cinemas and laser tag. The company reports that it has been supplied for use on cruise ships, in bars, in private homes, even assisted living facilities and retirement homes!

Switch switches to Turkey

SWITCH International, the supplier of tenpin bowling equipment, has expanded its operations, relocating its headquarters and factory to Turkey and carrying out new installations as far apart as Mauritius and France, as well as supplying the equipment for the Singapore Open.

International CEO Alain Winterhalter sent his marketing and PR director Cynthia Winterhalter, out to Izmir, Turkey, to assist local president and managing director Ahmet Solmaz in opening the office. It was designed to take advantage of the rapidly expanding Turkish market in shopping malls and FECs.

The opening in February in a new building means that Switch now has its new manufacturing, logistics, service and sales hub based in the country. "We have stepped up our investment in research and development, including design and this side of our business will remain in Italy," said Winterhalter.

"Our reason behind the move to Turkey is simple. Turkey is one of the world's top three growth economies with an average GDP growth rate of 5.9 per cent in the last nine years and the forecast is that it will be at 6.7 per cent between 2011 and 2017.

"Fifty per cent of the population is under age 29 and is dynamic, well educated and

multicultural. There is a hard-working labour force and an investment-friendly climate from the Turkish Government."

Since the move, Switch has been working hard on new projects. It has opened the first Switch location in Mauritius, an eight-lane centre, on June 29, within a stand-alone leisure complex named Funworld. The company has also opened two new locations in France, an 18-lane installation in Varennes in May and an six-lane location in Langatte in April.

And a prestige event for Switch – it supplied the equipment for the 46th International Bowling Open in Singapore, after first gracing the red carpet at the country's annual Sports Awards. The Open was held at the Orchid Bowl using 36 lanes.



Switch's new Turkish headquarters in Izmir

Delights unlimited

In the 21st century bowling centres of the modern era, when it comes to leisure and entertainment options, you are only limited by your imagination. For the go-ahead big boys in the bowling industry the old-style alleys have long since gone the way of the dinosaur.

What was once basically a no-frills industrial warehouse in which to lay down your lane beds and ship in the pin-setters, is today a Family Entertainment Centre (FEC).

If you're building from scratch or overhauling an older building, your bottom line is dictated by what you are paying out per square metre. Bowling centres mushroomed in post-war America because edge of town sites were cheap to develop and permits easy to obtain. AMF introduced the automated pin-setter in 1946 and in the post-war American dream the industry exploded.

Rampant consumerism, alongside mass car ownership, freed up American families to do what America does best – go out and have some fun! Bowling leagues thrived, centres got bigger, the neon signs brighter and a whole generation grew up with the game. It seemed a sure-fire winner. You played any time you wanted, it was family fun, safe and relatively inexpensive. Pitch up in any new town in the States back then and you'd be sure to find somewhere to bowl.

All owners had to do was make sure the air con ran in the summer, the heating came on in the winter and count the money. If they could be bothered at all, you might find a Coke machine installed near the cash register, and if they were fussed, maybe a grill chef to flip burgers for you and serve coffee. And all those establishments disappeared along with the steam locomotives.

In an austerity driven world the new sociological trend for Western countries, the US especially, is cocooning. Social habits and the fabric of family leisure time have changed dramatically. All the entertainment packages you need now flood into the home in a nano-second, and that knocking at the door is your hot dinner delivery man.

US gas prices in the past decade caused Americans to think twice about an 80-mile round trip across the prairie for a night's bowling. Real estate prices and changes in consumer trends had bowling centres struggle for profitability in city centres and downtown.

Profitability for all the big concerns for some time now has come from emerging markets in Russia, the Gulf region and south-east Asia. The European and American markets are either static or stagnant, with high land prices the determining factor for new build expansion.

Which is why the modern family entertainment centre entrepreneur must think way out of the box to ensure he is maximising

profit from every square metre of floor space. To the point where the actual pastime of tenpin bowling almost becomes peripheral to his core business plan.

The business model is far from broken, but it has required radical re-invention. Over a million games a day are still played around the world. Here's a list of activities you can find attached to bowl operations today that from a business to business perspective may open your eyes.

Indoor rock climbing walls, hitting cages (baseball), basketball hoops, crazy golf, skating rinks, indoor soccer, race-car simulators, laser lounges, gymnasias, saunas, running tracks, spas, golf driving cages, swimming pools.

On a smaller scale video games, arcade galleries and redemption/prize consoles provide a cost-effective and natural fit. Such revenue streams can be leased or rented, are adaptable, low maintenance and easy to upgrade. Centre operators love them as much as the kids.

Noro Automaton for example, an Augsburg-based company, seek to exploit this market through its Game Gate. Four million game consoles plus a year are bought in Germany. Game Gate enables gamers to connect their Microsoft Xbox 360 or Sony PlayStation and access 250 plus licensed games while waiting for their reserved lanes to fall free or their buddies to show up.

Traditional table top games never lose their popularity. You will find huge lounges in the Far East dedicated to pool, billiards and snooker. There has been a big take up in electronic darts, especially in Europe, alongside the old warhorses of table football – or flipper, and air hockey. Depending on the territory, licensed small stake gaming machinery of the poker/roulette/wheel of fortune type can prove a real money-spinner.

Pre-teens and toddlers should also be catered for while they remain too small to swing a bowling ball in anger

Pre-teens and toddlers should also be catered for while they remain too small to swing a bowling ball in anger. And where crèche and community leagues flourish (Scandinavia for example) a soft play area and appropriate play furnishings are a must add-on.

It won't have escaped your attention, had you visited a bowling centre of any kind in the past decade, to realise all that neon on the way in means hello and welcome to Party Central!

Music programmes and big screen rotation get the message across, even from a mid-morning visit. 'Rock n' Bowl' might be

Phil Mison, pictured with Lena Sulkanen former World Champion, from Sweden



trade mark protected by the famous old New Orleans house that first came up with the concept of hiring a live band on Saturday night, but plenty of houses around the globe have stolen both the name and adapted the concept.

In-house DJ teams are on hand to keep those kids and corporate parties humming, while at weekends the party really gets started. Modern centres convert easily into rocking discos – and along with that comes a need for all the latest in club culture design, lighting and technology.

In conclusion, we have of course left that one crucial component in any successful bowl operation till last. Many a centre will live or die by the quality and reputation it garners for its in-house catering and hospitality. The food and beverage operation will form a central plank in your path to profitability. Suppliers from the trade should be falling over themselves to claim your business. You can set the bar high or low, but never compromise on quality service. The industry will offer you everything from retro 40s diner, Bavarian brauhaus or Irish traditional pub to upscale Manhattan cocktail lounge.

The business of bowling is a very flexible beast. The Russian government is developing a network of regional mega hotel and entertainment complexes from the Urals to the Pacific. Every site hotel will incorporate a bowl. The game has taken on a unique complexion in Russia, where it is seen as an exclusive sport like golf. Centres in St Petersburg and Moscow have mushroomed. Many are in ultra-modern shopping malls, but some have developed into private member clubs catering for the well-heeled into the small hours. For well-heeled Muscovites, it's the cool place to be seen. Try telling that to the good ol' boys in Montana at their Friday league night for a few beers after a week herding cattle!

Phil Mison: CEO KPTV TV and event management. Consultant and media director to the EBPA (European Bowling Proprietors Assoc. Norrköping, Sweden).

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Keeping karting on track

Formula K working with some major play centre designers

PUTTING go-karts and other styles of vehicle indoors is something which is relatively new – or at least unexpected by many. But for Formula K, which is based in Wales, UK, indoor play is now a major market for children's mini-cars and the company is working with some major designers and suppliers who regularly incorporate a mini car track into their play centre designs.

"We work as car and tractor supplier to SPI Play, House of Play, Sport and Play, Play Revolution, Softbrick, Cheer Europe and ELI Europe," reports Dan Liddle, son of the founder of the company Graham, who is a four-time go-kart champion.

Much of the company's work currently is outside of the UK and features both the petrol cars for outside and the electric models for indoor use. Full-size go-karts now feature in many parks across the world. Recently there was an order for 30 of the company's Bandit go-karts to

the new Sindbad Land theme park in Baghdad, Iraq, which became the 50th country on the company's exports book. In the same part of the world, Formula K remains the preferred supplier to Touristic Enterprises which operates parks in Kuwait and Formula K has recently upgraded all of the vehicles in one of its existing parks to the flagship Bandit single seaters.

The range runs from cars suitable for age groups four years up to 12-year-olds and the battery operated mini-car range has been the company's biggest success story in recent years, representing around 75 per cent of sales. A mini quad bike coin-operated children's car began this range, expanding to the Grand Prix Car, the Farmyard Tractor and Toro the two-seater go-kart. A Jeep/beachbuggy is about to be added.

The company now works with agents in different parts of the world, with Germany and the Netherlands handled by Okidoki Consulting and Ring Bingo AB in Sweden which handling Scandinavia.

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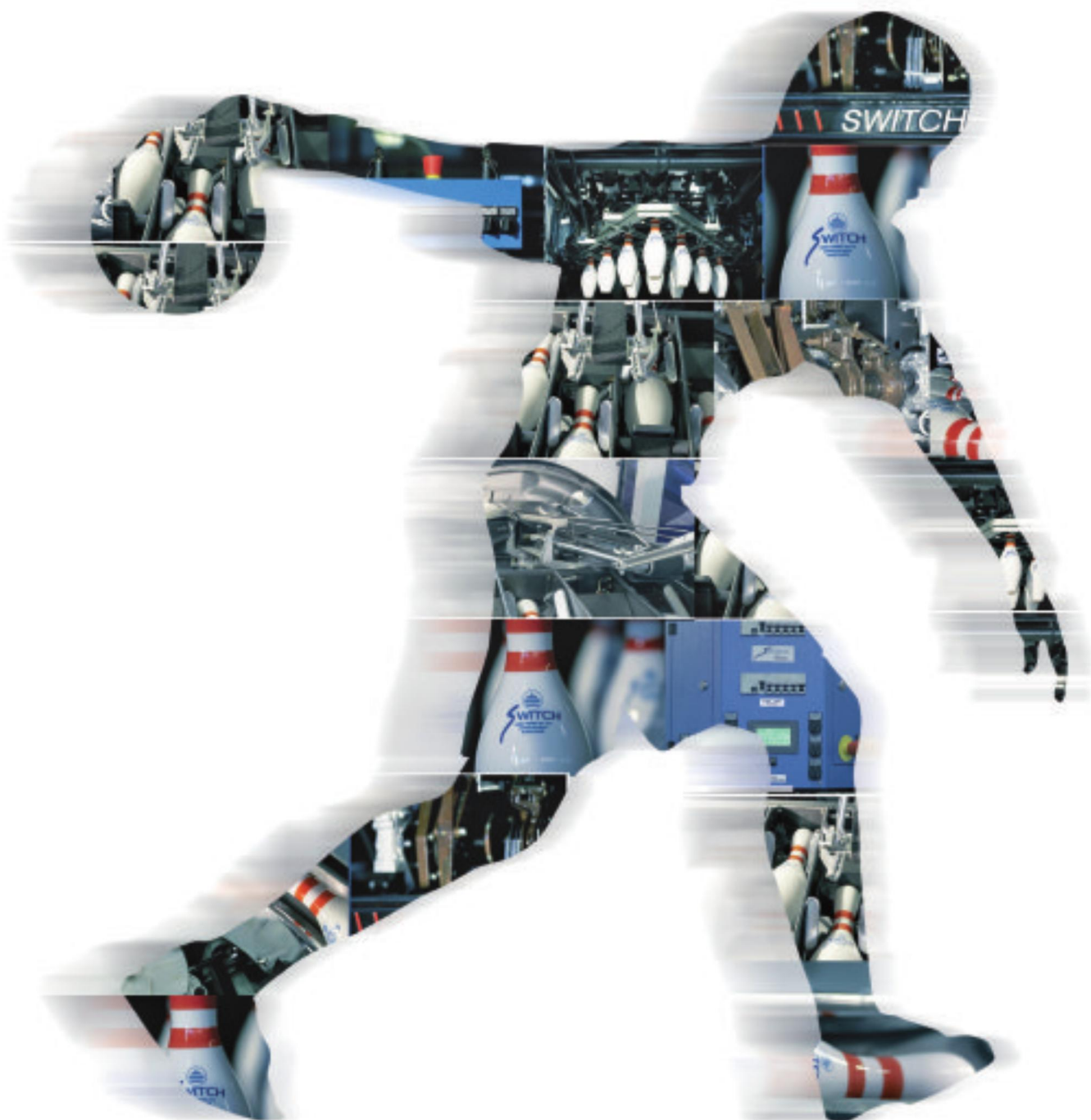


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The games and redemption area adjacent to the food section

Putting smiles on faces

Putting nearly all of the different disciplines of fun and entertainment under one roof is an ambitious aspiration, but a location in Canada has done just that. A climbing wall, jungle gym, laser tag, mini-bowling, redemption games, soft play, bumper cars and motion theatre has all been gathered under one roof at Funhaven in Ottawa

DELIVERING fun to all ages but cumulatively to families in what it describes as “an upscale and affordable environment” and using every imaginable marketing device to ensure the local community is aware of the benefits of the location, has brought industry and tourism awards to Funhaven.

Brothers Dave and Hugh Ellis were the inspiration behind the development of Funhaven. They wanted to provide a facility in which people of all ages could spend some relaxing time together and strengthen the bonds of family and friendship. Their research began in 2008 at the IAAPA show and culminated in a feasibility study; then the funding process followed and the pinpointing of a venue.

“We believe that there is always an opportunity to contribute joy to the world, whether it is through enabling families to spend quality time together, raising funds for worthy causes or even just putting a smile on a face that has not been finding reasons to smile”

The start-up date was December 14, 2011 and it opened with the mission that it should “Make Lives Better”. Said Dave Ellis: “This mission guides our decisions on how we operate, the activities in which we engage and the ways in which we interact with our guests, our team members and the communities which we serve.

“We believe that there is always an opportunity to contribute joy to the world, whether it is through enabling families to spend

quality time together, raising funds for worthy causes or even just putting a smile on a face that has not been finding reasons to smile.”

Funhaven, he said, brings together attractions, entertainment and quality food under one roof, serviced by an operating team that understands the importance of the guest service experience. “We captivate our guests with innovative approaches in all that we endeavour and foster a passion to create personalised experiences for every guest we



The four-lane QubicaAMF bowling installation at Funhaven



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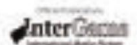
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meet. We are energised by imagination and charged with the task of elevating the quality of entertainment for our guests."

Something of a 'fun evangelist' comes out in Ellis's very genuine guiding principles which he puts down simply to "recognising the inseparable link between family and community." They support community events and provide resources to support local groups, teams, associations and organisations with the aim of synergistically improving the community and with it, the business.

Funhaven now has over 110 employees and in its first year served 200,000 guests. Its birthday party programme has been hugely successful with a 98 per cent 'totally satisfied' feedback. All elements of the location work extremely well in sync with one-another to the pitch where the company was asked to make a presentation at the last IAAPA show.

"It was an honour to speak to a gathering which included executives from companies like Disney, Six Flags, Universal and Sea World," said Ellis. He was also able to tell them that one of the Funhaven community projects, supporting the Children's Hospital in Eastern Ontario raised a record \$80,000. This and other achievements of the location brought it nominations for the Best New Entertainment Center in North America and the Best Redemption Prize Center in North America.

Putting all those differing elements of entertainment under one roof, said Ellis, was essential to appeal to everyone. A multi-attraction venue appeals to a broader make-up of individuals, toddlers, children, teens and adults and at Funhaven they all find elements to attract them. "Guests can invest multiple hours into one experience without needing to commute around the city and the availability of family-friendly food helps to provide an all-in-one experience for an entire afternoon or evening."

It's always difficult to determine how much the entertainment mix affects the success of a given location with so many other factors involved

None of the separate attractions 'fight' one-another, said Ellis. "It's always difficult to determine how much the entertainment mix affects the success of a given location with so many other factors involved. Location, weather, economic climate, demographics and local competition all play a role in affecting the performance of an individual venue which makes apple-to-apple comparisons with other venues almost impossible.

"Certainly from the perspective of Funhaven management, the formula that we have introduced to the market was well researched and appears to provide a fulfilling experience for guests who typically opt for a pay-one-price



A Zone Rift system



The arcade about the climbing wall

for unlimited play model.

"Our only concerns are making sure that the choice of attractions which we have employed tend to focus on the guest experience during busier periods. For example, our mini-bowling is very popular but with only four lanes available and a fairly long game time it can be frustrating for guests who are waiting to participate in that activity and queue management is very challenging."

Funhaven is a stand-alone location, away from retail, but positioned directly on a highway with a very high traffic count. Is this ideal? Ellis admits that access to Funhaven could be better, guests having to travel several roads and make a number of turns to reach it, but the importance is being situated in an area where large numbers of people are already headed such as shopping centres and other entertainment venues is valuable. "Unfortunately, the occupancy cost in those areas is also high and as a space-hungry business, the return may or may not be achieved."

Comfyland the edutainment area at Funhaven



The location has a pay-one-price policy, an all-year pass costing as little as £99. Ellis comments that laser tag "tends to surprise people most frequently." First-time players report a high 'wow' factor. Traditional fun elements such as bumper cars are popular and the more modern introductions such as the climbing wall achieve the 'look at me!' element for children. Bowling, he said, is an excellent attraction in that it permits parents and even toddlers (with lane bumpers) to both play the same game and have fun at their own skill levels.

In retrospect, the Ellis brothers would not have done anything differently, but that is a testimony to careful research and planning. They have shown that a multi-faceted location can be stand-alone and that so many disparate forms of entertainment can happily co-habit and contribute very positively to a local community.



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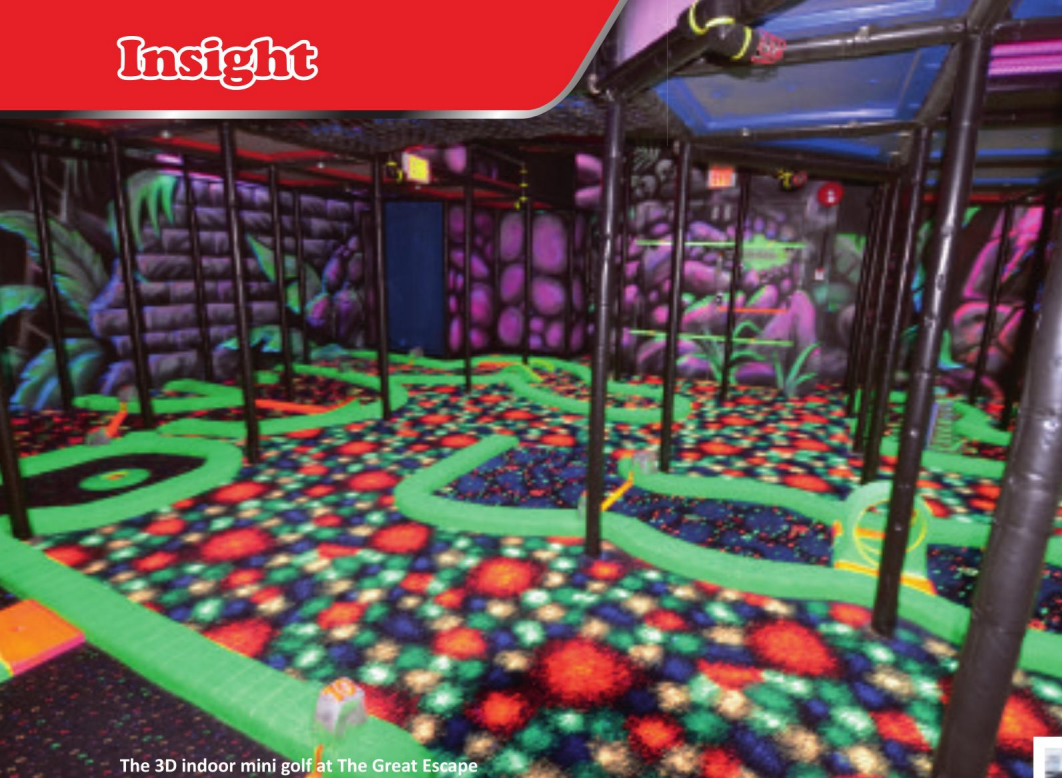
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The 3D indoor mini golf at The Great Escape



The Lightspace floor for interactive fun



The exterior of The Great Escape

FEC focus: finding the right mix

Making indoor golf, soft play, playgrounds, jungle gyms, laser tag, climbing walls and a wide range of other entertainment products, then harnessing it all into a turnkey FEC, means that International Play Company effectively does it all

PLAYCO, as its name is abbreviated, has become the established name for taking a space and then building it from the ground up into an FEC – plus producing all of the content.

The Canadian company has become so proficient at the science of FECs that it decided to go one better than produce a brochure – it produced its own ‘shop window’ location.

Anyone thinking of building, developing or investing in an FEC now simply goes to The Great Escape at Langley, British Columbia, where they can see everything under one roof. The Mayan indoor playground, a two-level laser tag, 3D indoor mini golf, Highway 66 bowling, the Air Trek Obstacle Adventure, the Ballistics Arena, a toddler playground, arcade with redemption games and a café, are all there, in a standalone location.

It has become the fun hub of the local community, servicing birthday parties, corporate events, team wind-ups, team building, fund-raising, private parties, all-night parties and a mecca for families seeking a pleasant pastime.

Given all of this, Iplayco could be reasonably said to be the great expert on FECs, how they work, the best combinations and the whole

principle of offering family fun. The company doesn’t even subscribe to the overall view that family entertainment works best in a retail environment.

“There is still a real mix when it comes to location for FEC installations”

“There is still a real mix when it comes to location for FEC installations,” said Scott Forbes, president of Iplayco. “There is no straight answer except to be more location specific. Some projects require a retail atmosphere for high traffic shopping centres to provide additional foot traffic exposure to the facility, while others such as strip malls and free-standing mixed commercial use buildings, provide generally lower lease or rental commitments. Through marketing and advertising initiatives, these facilities can do well and are really more of a destination location. It really comes down to a good business plan as well as other important factors such as adequate parking and access to the location itself.”

The entire sector has stepped up to the mark, now going well beyond the basic concept of coin-op redemption and games wrapped around with rides and F and B. That is a basic understanding now on a global basis but the evolution of the business is moving at a different rate in different parts of the world.

Iplayco, dealing internationally, is in an ideal position to evaluate that. “Each country and continent has specific requirements or considerations such as weather, economics, language, religion and various other important factors which must be taken into account when creating a business plan and the criteria to be successful there.

“Even in North America there are differences between cities. People from Brooklyn may not go to a facility in Staten Island. Transportation and other factors pose important questions when you are preparing your business plan. You have to find out what the intangibles are that will draw customers from further distances and decide whether the investment is such that you are a true destination or if you are a community-sized facility.”

There is a difference, it seems...

The product mix that was put into a Discovery Zone in the 1980s is very different

than that to be found in an all-ages facility such as Dave and Busters or The Great Escape, which have offerings for all ages.

"Rides, giant playgrounds, sports events, interactive components, 4D theatres and other larger attractions are also being considered in larger 'destination' FECs looking for larger demographics and higher visitor traffic than in a smaller community FEC. That isn't to say that a well-designed café and play atmosphere with a playground and great food won't succeed. If the business plan and operations are created dynamically for a certain community then it has every chance of success.

"But there are now various sizes of FEC to consider, rather than the basic concept of a playground and snack bar compared with the style which started off years ago. Internationally it is similar, but we are seeing large playgrounds with sports and interactivity taking over from actual rides or arcade games with redemption.

"Fitness through fun play activity seems to be more dominant in Europe and the Middle East. Asia still has a mix of arcade and redemption as a standard element but the rest of the world seems to have various sizes and content, depending on the use and demographics of each area."

While developers and operators are interested predominantly in ROI, is there evidence to show that, for example, a soft-play attraction will perform better if there is a climbing wall adjacent or that bowling needs an additional element such as laser tag, or that an aerial adventure trail can dovetail with a set of battery-operated bumper cars?

The Iplayco view is interesting, because these combinations are exactly what has gone into The Great Escape. How do they co-relate? "It depends upon the facility. ROI involves all aspects of the business from location to demographics to rental rate, size of facility and content of attractions. All of this comes down to the grand plan for each facility.

"The playground is certainly an important staple of most facilities but having climbing walls, laser tag, bowling and other attractions allows customers to have 'fries with the burger'. Once you have the customer at the facility they are a captive audience, so provided that the attractions are of a quality and the pricing is good to give perceived value, the customer will return more often and spend more once they are there.

"Great food service is also more important than most facilities realise. Reinvesting each year also shows the customers you are prepared to reinvest their hard-earned money into the facility while it also allows for new experiences which creates for the customer a need or desire to return."

ROI, says the company, needs to be tracked, partly based on cost analysis of each game, ride or attraction, but not exclusively as by just having an offering for parents to join in or party add-ons are also important. "It isn't just a case of a 'loss leader' in this respect. It is vital to



The Mayan adventure playground

have a large enough variety in your offer that the customer views your location as providing better value and a wider variety of events than that of a competitor.

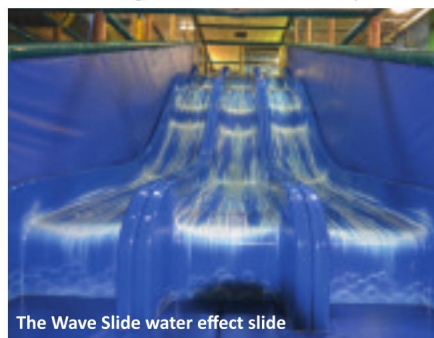
"Keeping a mix of 25 per cent of your equipment within two years old, 25 per cent within three years and 25 per cent less than five years old, with the final 25 per cent more than five years, means that you are striking a balance between current games, popular games and old stand-by games (just make sure that the older ones are in good, working order)."

It is this mix of great new, slightly older and timeless favourites which gives the value for money. Pricing games according to their age, so that newer ones may cost more but older games are reasonable but still fun, is a skill by itself. "If a game falls to the bottom revenue for six months in a row, it is likely time for a replacement."

But are there elements which do NOT work together? Has the experience of operating The Great Escape taught any lessons? "Every FEC has to consider one substantial cost which is tied to having a variety of attractions: that is staff.

"In order to offer an array of events and games you must adequately staff these areas, so careful consideration must be given to which events/rides/games you choose for the facility. Bowling is an example; it is a good attraction and has a decent profitability but does have maintenance issues from time to time.

"Really, any attractions with moving parts that can be manipulated by the player will have some degree of maintenance required.



The Wave Slide water effect slide

Climbing walls are also tricky as they require trained staff and can be sporadic with guest interest. As far as what works best in combination, a playground with ballistic arena and a great toddler play area are a must. But with either laser tag or air/trek, climbing wall area, or with redemption and bowling, we believe, are good combinations.

"Golf works really well as an additional profit centre, but only as an additional attraction and not as a main event. Arcade games, if pursued should be selective, especially if your customer base is primarily 12 and under. Be careful of violent games that may not mix with younger customers.

"The combination of adding these attractions to a party package really helps increase the party value as well as the variety and capacity of the facility. What you can do is spread the customers out into various areas instead of just one or two main attractions. This is better for repeat and walk-in visits too."

But what makes money? It seems there is no really simple answer to that. In the case of The Great Escape, says Iplayco, the playground with two interactive floors and a ballistic arena at no extra charge may be the number one attraction, but it cannot be accurately put into numbers as a statistic of how much each item brings in each month.

"For simplicity's sake, I would rank the various main attractions thus: 1 playground and ballistic arena; 2 laser tag; 3 Air Trek, 3D mini golf, bowling arcade, redemption, climbing wall."

Would Iplayco do anything different next time around? Tweaks and minor changes, they say. "If we did something different it might be to go bigger and add in our new science/interactive areas and dramatic play systems with which we are enjoying great success in children's museums and school groups. This adds in extra daytime revenue."

Take a look at www.discoverykidslv.org which will show the new giant science tower The Summit with interactive exhibits, which Iplayco is involved in creating for edutaining visitors to Las Vegas. That alone shows graphically just how far the FEC can go today.



Activity parks with a difference

Injecting fresh ideas into playgrounds has become a passion for a company from Finland, Lappset Group, which is enjoying a run of success with its Angry Birds Activity Parks since the range was launched two years ago

THEY have become a tourist attraction in their own right, combining gaming and playing through a range of fun activities. The visitor creates his or her own activities rather than observing the more usual amusement park process in which the guest is the object.

Each park is full of interactive play and sports equipment to add value as well as healthy activities and edutainment. An interactive music arch called Sona offers different sets of education and dancing games for both children and adults and the music is remotely controlled through the internet by the customer.

Guests can use an interactive ball wall named Sutu to practice their football skills and even become the star of their own football team. "The only limits are those set by your own imagination," said Kirsi Saravuoma, marketing manager at Lappsets' Themed Activity Centers Unit. "Guests can also play virtual Angry Birds games on oversized touchscreens while running around, climbing and generally having fun. There is also a game



lounge for relaxation."

There is a wealth of interactive solutions offered by Lappset in its range which is put together specifically to suit the location. The concept brings added value to the visitor's experience of activities and also differentiates the offerings of a tailored park. The concept also includes branded shops and restaurants.

Lappset has already provided many Angry Bird Activity Parks to several countries in different parts of the world. The first was opened a year ago in Särkänniemi Adventure Park, Tampere, Finland, and that was followed by large indoor experience parks in the Finnish mountain tourist resorts of Vuokatti, Saariselkä and Kuusamo in the north of the country. There was also a recently-opened indoor park in a shopping centre in Lappeenranta, in the south-east.

Britain's first Angry Birds park was opened at Sundown Adventureland, Nottinghamshire, and only in May a flock of Angry Birds landed at Lightwater Valley, the amusement park in Yorkshire which was heralded by BBC television as "an expectation to boost tourism".

Further afield there is an outdoor Angry Birds Activity Park opening in Haining, China, and another in Puerto Rico in the Canary Islands. Another is to follow in Kuala Lumpur, Malaysia.

The concept can be used in a commercial setting or can be employed by local communities, a free public park in cities and municipalities. In Finland there are several Angry Birds Play Parks set up in this way.

The world-wide popularity of gaming in Angry Birds has expanded its scope from the virtual to reality by activating people of all ages to play interactive games and traditional physical play activities. Two Finnish companies, Lappset Group as the themed activity centre designer and manufacturer and Rovio Entertainment, the 'mother' of the Angry Birds game, launched a new family entertainment concept based on the Angry Birds brand two years ago. Rovio provides the brand and Lappset creates the designs, manufactures and installs the tailored activity parks.

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Rock 'n' ropes

The great thing about the rock climbing experience which has entered the playgrounds market in recent years, is its versatility. It can be a small installation for four-year-olds in a soft play area, no more than three or four feet high and therefore unattended. It can also be a safety harness experience for older children as an attraction in an FEC

THE versatility spreads further for the attraction can be found just as frequently outside of a formal FEC, as a feature in a shopping mall, beach attraction, on board a passenger cruise liner, a central feature to an hotel atrium... In short, anywhere there's people.

And that has led to other forms of harnessed adventure. We are seeing jungle gyms, skytrails, aerial adventures, whatever you want to call them... Ropes and harnesses and special treeline walkways and trails and you can find them just as easily high up under the dome of a huge indoor FEC, or in a rain forest visitor centre. Again, anywhere there's people.

But to begin at the beginning. New Zealand company Sheer Adventure claims credit for inventing indoor climbing. 'Claims' might suggest we doubt it; we don't, we just don't want to be open to controversy! John Targett at Clip 'N Climb takes us through the background...

"Sheer Adventure in New Zealand invented a brand new category of indoor climbing – dedicated arenas full of different 'climbing challenges. Clip 'N Climb changed the business model for climbing gyms (these charge for entry and you can stay all day), charging for one hour climbing sessions and using Auto Belays throughout (these are the clip-on devices which control the descent).

"It has immediate appeal, not for people looking to go climbing, but for people who are looking for 'active fun'. This has a major

appeal for kids of 4-13 years and parents love it because they love to see their kids push their boundaries and challenge themselves. Each 'challenge' is based on actual climbing techniques and holds and are designed to provide variety of experience in a climbing challenges, visual and tactile sense."

Sheer Adventure entered into a joint venture with design engineers in Christchurch, New Zealand to produce an innovative new-generation Auto Belays using magnetic eddy current braking technology to better meet the needs of the high use Clip 'N Climb business model. Sheer Adventure sold their share to focus on Clip 'N Climb but retained the global distribution rights.

Clip 'N Climb was rolled out globally and facilities are now operating in Australasia, Europe, Central and North America. As well as dedicated Clip 'N Climb centres, it installs challenges in FECs and major tourist attractions such as the Houston Space Center.

Copycat versions have emerged and, says Targett, served to increase awareness and demand for this active entertainment sector of the amusement industry. His company, he says, remains the market leader in the category and has no plans to move into associated activities such as 'aerial gyms', preferring instead to work closely with other industry leaders such as Ropes Courses Inc and its Sky Trail.

The climbing wall works well with other family entertainment activities and is the natural next step for kids after soft play and Clip 'N Climb continues to innovate in terms of its climbing challenges, such as Twister the latest challenge and has just patented a device which will replace the current attachment system between Auto Belays and climbers. The Sequenza will be launched along with a completely new climbing product specifically designed for FECs with limited height at the European Attractions Show in Paris this month (September).

Targett and partner Tim Wethey, the founders of Clip 'N Climb, now have over 20 of their locations spread across the world.

These are of course climbing for fun installations. At Walltopia, the Bulgarian-based specialists with offices all over



Twister, new from Clip 'N Climb and due for debut this month at EAS

the world, Patrick Andrey says it is important to differentiate between climbing for sport and climbing for fun. There is now a strong cross-over between the two. The first artificial climbing structures, he says, were actually in the UK and the first artificial modular climbing developments were in France in the early 1980s, but the first commercial climbing gyms opened in the early 1990s in Europe and the US.

His company builds both climbing structures and rope courses under the brand Rocktopia. "Climbing is a social sport which gives opportunities to hang around with friends and the artificial walls are successful because they bring a feeling of adventure into a safe and urban environment." He would not dispute the suggestion that there are as many as 20,000 artificial climbing structures for entertainment around the world, but it is difficult, he says, to be precise about where they are.

"A climbing wall is very different from a climbing gym, which defines a club like an enclosed entity offering climbing walls and other services. Some locations may be

John Targett (right) with Tim Wethey, the Clip 'N Climb team





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schools, fitness gyms, hotels, sports centres, universities, public parks, military bases, theme parks and FECs. There isn't even a typical ROI since the success of any wall is purely depending upon the programming and the type of operation."

Andrey emphasises that walls will work with other attractions for anyone from four-years-old or even less upwards, but he says many operators shy away from them for fear of additional operational requirements and costs, since many associated entertainments such as soft play have a far lower cost base.

"We have a healthy respect for our competition and we're working to stay nimble and be aware of what's in the marketplace and how we can always serve our guests better.

"I would say that the outlook is quite positive and we're excited about the future."

Rocks 'n' ropes - Treetops

THE advent in recent years of what could loosely be described as 'aerial adventures' has revolutionised many amusement and entertainment locations. Companies have set up to specialise in constructing these high-above-ground courses which can be tailored for families or adults only.

They stem from the zip wires business which originated in outdoor playgrounds and can now be found in the form of harnessed walkways and challenging courses in treetops outdoors or even high up into the ceiling of major indoor family entertainment centres.

In short – anywhere there's people and height is a potential location.

Christophe Jolland, technical and project manager at SkyZip Engineering, a specialist company in the sector, explained that there is a multitude of existing ziplines, aerial trails and treetop adventure parks around the world. The first were the 'high rope challenge courses' which were set up in the US and UK and did not target the wider public and were not part of the leisure or tourism industry. "Most were in places such as scout camps, high school backyards or were an addition to team building activity centres.

"Then the first to achieve any real degree of commercial success came in the 1990s in the Alps to add activities to winter ski resorts in the summer months. At that time most were in forests with challenges and ziplines installed from tree to tree. Now, some of them are built on artificial poles integrated into natural surroundings or in theme parks. Indoor structures and indoor ziplines are also created in malls or indoor theme parks and FECs."

Most of the existing commercial installations are run as a unique attraction or as a major attraction in a leisure park while others are part of a larger amusement park or integrated into tourist complexes such as large hotels, indoor sports and leisure complexes or outdoor activity camps.

The factor which affects all of the commercial ventures is that they have to pay for themselves. The cost of design and

construction can be anything between US\$250k and \$1m but smaller structures installed as a part of a wider park can be created for less. Typical ticket prices for guests are in the \$20-\$70 range and daily capacity ranges between 350 and 1,500 per day. Notably, operation costs are low and consist mainly of staff salaries as almost no electricity or water is used.

The staff salaries are hard to overcome because a nucleus of safety attendants must be on hand. In the US the ACCT standards and in Europe the EN15567-1 and EN15567-2 standards demand the number of staff to operate a commercial aerial trail, zipline or treetop adventure park. While the numbers depend upon the size of the structure there has been in recent times some significant reductions in the necessary attendants made by the use of the most up-to-date equipment.

The boom in the market in the past 10 years has thrown up some innovations increasing capacity, reducing operating costs and offering higher safety levels. New this year is Clic-It, a smart-belay system and ZipStop a self-regulating magnetic braking system for ziplines.

So who uses these devices? According to Jorrand the guests are 65 per cent adults and because tickets are sold for less to children, the sales percentage is 75 per cent from adults.

A commercial zipline can be either a unique very long one of up to 2,000m or 6,500ft or circuits with up to 20 ziplines each of them between 50 and 300m in length. This is a far cry from the short and low-level zipwire often found in non-commercial local authority-installed and unmanned children's playgrounds in urban areas.

There has been until now a stand-alone nature to zipwires and aerial adventures, but in recent times there has been a growing number of instances where they have been introduced into FECs as an additional attractions. Jolland's SkyZip has successfully undertaken a number of projects where they have operated in conjunction with indoor FECs and theme parks.

From the first treetop adventure park opening in France in 1995 the milestones in the industry demonstrate how the ropes side of the amusement and leisure industry has grown. By 2000 there were 45 treetop adventure parks in France. Five years later there were 350 of them across Europe, Canada and Mexico and by 2006 the first ones opened in the Asia-Pacific region in New Zealand, Australia and Indonesia. By 2010 parks began to open in the US, China, Singapore, Korea and Malaysia.

It is now a world-wide phenomenon which initially grew separately from the rest of the wider amusement/leisure/entertainment business but which is now beginning to cross-pollinate with the wider market.

SkyZip has two offices; one in Grenoble, France, where the first treetop adventure parks were created and the other in Bali, Indonesia, which was opened in 2004 and is now the official base of the company. It has helped SkyZip to penetrate extensively the Asian market.

Thrills at your own pace

ANOTHER company which specialises in this area of entertainment is Ropes Courses Inc, a US-based company with offices in Germany, the UK and Australia. It has been manufacturing, installing and servicing adventure course products for 24 years.

It is key that courses have to be designed for individual locations, either indoor or outside and Ropes Courses has been putting its Sky Trail into FECs, amusement parks, zoos and museums all over the world. "The emphasis has to be providing the thrill of doing something a bit out of the individual's comfort zone, done at his/her own pace," said Shawn Persons, marketing manager at the company.

The all-steel structures consist of high ropes adventure courses with horizontally strung cables, ropes, boards and other materials secured between steel supports to create elements or activities. The guests have full body harness and a safety lanyard or sling line which is inserted into an overhead track.

They can choose their path around the course at their own pace and always in total safety, possibly on two track levels, moving up or down between them.

It all sounds very 'adult', but as Persons emphasised, there is plenty for smaller guests too in the form of the Sky Tykes course for children aged two to seven years, which has easy parent participation.

The latest addition to the range is the Sky Rail, a rigid zip track offering a unique ride in places and at heights which its predecessor could not reach. It also brings together Sky Rail and Sky Trail into one adventure.



Top: A Canopy Challenge course for children from Ropes Course Inc.

Above: A Sky Trail all-steel installation illustrating the ability for guests to move between levels

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Q&A with Nathalie Depetro, director of MAPIC

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Laser tag, the go-anywhere alongside anything game

The most versatile entertainment of them all is laser tag, says Sam Kelly, CEO of Australia-based Laserforce International, because it will work with any other form of leisure pursuit without competing for the leisure 'spend'

HIS company, now the largest supplier internationally, and with a 25-year track record, operates with its own equipment as well as supplying it to the rest of the world. That was how Laserforce began – loving the concept,

but failing to find the perfect system – so Sam's father, Len, made his own.

"It is the sheer, unadulterated enjoyment gained from player laser tag that makes it stand out as an anchor attraction among the other sources of entertainment typically found in



An example of an 'opponent' in laser tag, the SpaceWorm



an FEC. So what will typically happen is that people will come to your venue specifically to play laser tag; then when they've played their set number of games, they will go off and play a game of bowling, or spend time in the redemption arcade, or have a go on the climbing wall.

“Laser tag not only makes money in its own right, it also lifts the take of all your other games and attractions as well”

"So laser tag not only makes money in its own right, it also lifts the take of all your other games and attractions as well."

Kelly's passion for his own product is tempered by the honesty to admit that the same kind of results would accrue from other laser tag products. The difference, he says, is derived from a system which integrates all the games and attractions inside an FEC with the Laserforce patent pending Combined Force module, which is optional as part of the new Gen7 Supernova system.

"When Combined Force is in operation the end result is significantly different and the patent means that we have it all to ourselves – it cannot be duplicated."

He has noted the number of bowling centres adding laser tag to their venues. Kelly thinks one in four of Laserforce's customers are now bowling operators. "Our biggest customers are Ardent Leisure, which owns AMF Bowling and Main Event and Strike Bowling, Australia's largest boutique bowling chains."

It is also interesting to note that with the growing lucrative nature of children's birthday



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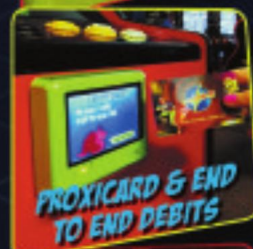
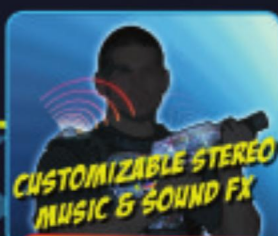
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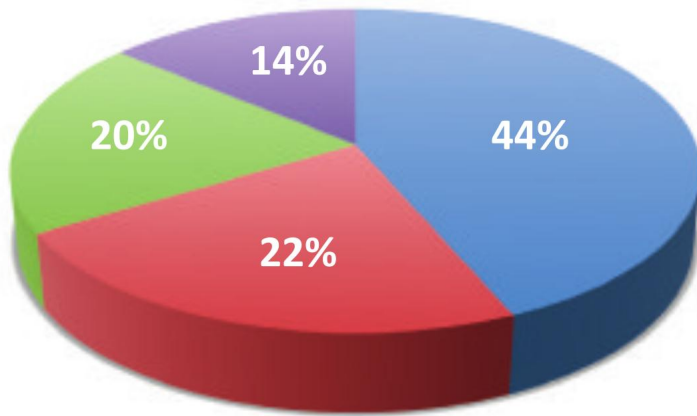
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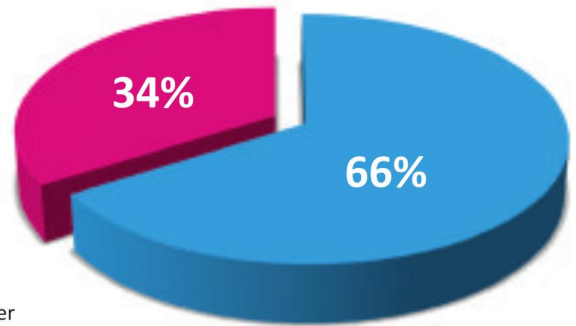
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Age breakdown: The division between age groups in a typical laser tag operation. Source: Laserforce

- 11 years and under
- 12-15 years
- 16-25 years
- Over 25 years



Sex breakdown: The growing number of female players in laser tag, now up to 34 per cent. Source: Laserforce

- Males
- Females

parties, the dominant demographic has shifted towards younger players. "However, around 40 per cent of our business is still derived from players over the age of 18. What is also interesting is the number of female players who enjoy playing Laserforce – around 34 per cent of total players."

Another interesting consideration is that

some laser tag system manufacturers use a militaristic styled gun and some parents and authorities perceive this as unsuitable for children. His own company's view is that a futuristic design will appeal to both youngsters and older players, male and female and will therefore maximise the potential income.

There are some other interesting points

to emerge from Kelly's deep fascination with laser tag. The lightness of the vest, the size of the phaser, the lock-on tone, the handicapping system, the on-board computer which guides the player through the game and the interactivity of the Living Arenas used by Laserforce, encourage players to work together to defeat targets.

Versatility the laser tag key

A CORE strength for laser tag is its versatility, says Dan Adamson at Zone Leisure Technology of the UK. "It offers a unique sensory experience evoking imaginative play among younger children and for teenagers and adults it can be more competitively played. The longevity of laser tag tournaments played at stand-alone facilities around the world is testimony to that and the willingness of players to travel to these events."

"Within the same laser tag arena the feel of a game can be very different depending on how low the lights are, the music, smoke... the atmosphere of the game can be entirely tailored to the customers you are catering for and people of all ages enjoy it. The product choice is also an important consideration. Zone's Nexus laser tag system for standalone centres offers a comprehensive set of options and capabilities and at the other end of the scale we have Begeara, our simplest product design for young children."

Considering laser tag alongside other entertainment offerings it is this breadth of appeal that strengthens the pull for customers to come to an entertainment centered, he says. "Our success with softplay centres using our Begeara Black Paw has proven that."

Where previously the centre's main customer base was families with children aged 1-8, the addition of

laser tag extends the appeal to older children and changes the perception of the centre in a positive way to older kids that associate softplay centres with tots and infants.

"It also adds an additional party option for younger kids meaning that if one year they enjoy their softplay party at your centre, next year they'll be back to try laser tag. We now have well over 100 sites in the UK successfully using the Begeara Black Paw system, and all gaining the huge returns from their investment that our mini laser tag system provides."

In larger FECs offering a range of entertainments like bowling, soft play, climbing walls, aerial adventures, multiplexes, etc., laser tag comes into its own, providing an opportunity for team participation. In Adamson's view, whether or not you know many of the people on your side before you step into the briefing room, for 15 minutes they are your allies and that social experience adds an extra layer of enjoyment. "You can, of course, also play laser tag as a solo game where your objective is to tag everyone and score as many points as possible."

With the explosion of home gaming and family participation via the Wii becoming ordinary, laser tag has experienced a resurgence in popularity. Kids are entirely comfortable with the concept of laser tag as it is not dissimilar to the games they play at home. Playing laser tag, therefore, with nifty phasers, flashing sparkly lights, their friends and an exciting arena, be it a softplay frame or purpose-built, laser tag is bound to be a winner.





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Trailblazing fun

With plans to expand its already huge network of stores around the globe, Chuck E. Cheese's is blazing a trail for family entertainment, writes **Simon Liddle**

CHUCK E. Cheese's, along with the eponymous cartoon mouse whose face appears above its stores, is synonymous with US family entertainment. Started in California by amusement industry visionary Nolan Bushnell, the company's first location, Chuck E. Cheese's Pizza Time Theatre, successfully combined a family restaurant with an indoor arcade, creating a concept that has been lucratively replicated across its chain of stores now numbering in the hundreds.

In 1984, Pizza Time Theatre and another company exploring the restaurant and family entertainment centre idea, ShowBiz Pizza Place, merged under the latter's name and began trading publicly five years later. With its base now in Irving, Texas, the company trades under the name CEC Entertainment and boasts a chain of 515 corporately owned and operated stores and 51 franchise restaurants. While the majority can be found in the US, the company is also present in eight foreign territories.

"The idea of putting pizza and gaming together was really a genius concept in that it created an environment that has all four things that children and families look for: emotional stimulation, social stimulation, hand-eye coordination and family sense of belonging and ownership," said Michelle Chism, director of corporate communications at CEC Entertainment. "That's why we have been so successful for more than 30 years."

It is difficult to estimate the number of customers that visit its locations; while many

choose to combine dining with playing games, often locations attract pure gamers who purchase tokens to play. One headline statistic, however, is the 14 million pizzas Chuck E. Cheese's restaurants sold in 2012. For the first half of this year, revenues stood at \$447.2m.

"We don't like to be called an arcade and we don't like to be called just a pizza restaurant. It's absolutely a mixture of both," said Chism.

For Tom Ward, director of games management, the integration of these various elements makes for a unique offering.

"I think the whole appeal of Chuck E. Cheese's is that you can bring your family and there is entertainment for everybody. We have games in store; we serve food; we have our character Chuck E. Cheese – when people come in they take in all those elements.

"What makes Chuck E. Cheese's so different from all the other arcades out there is the atmosphere and the fun entertainment people enjoy when they are here. It's just a really good environment."

For many people, the "traditional" introduction to Chuck E. Cheese's is through attending a birthday party at one of the company's stores, Ward explained.

"Because they have such a great time, they schedule their own parties here and then keep coming back to enjoy our games and our whole concept."

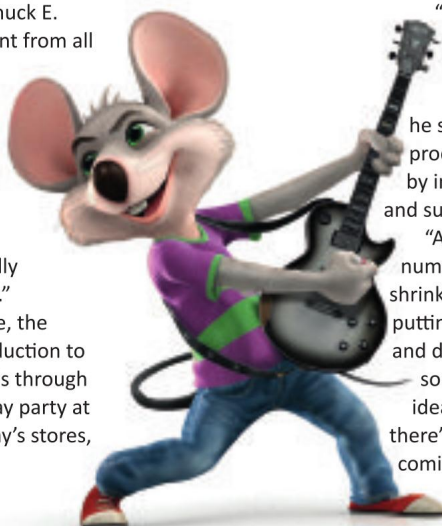
Each day the company powers up a 38,000-machine estate of games, making it one of the largest operators within the amusement industry. Its leading position within the pay-to-play sector is therefore without question. It is a role that it takes very seriously.

"On the games side, we work hard every day to make sure that when our guests walk through the door they have fun and entertaining games to play with," said Ward.

"We're always researching new pieces that will meet their needs."

What has been encouraging, he said, is the breadth of new product being brought to market by industry manufacturers and suppliers.

"Although we've seen the number of suppliers to the market shrinking, it is nice to see them putting something back into research and development to come up with some new equipment and new ideas. Over the last couple of years there's been some really good product coming out."



Its machines are all token operated, which is one of the “great value concepts” the company provides to its guests. Its stores often also feature cotton candy machines, ice cream dispensers and sketch and photo games from which users can take home pictures of themselves.

“We have a photo ride throughout the store that children can use to get their pictures taken with Chuck E. Cheese in the car with them. We also have a Fun House, which has distorted mirrors that can take your picture.”

Chuck E. Cheese’s target demographic is ages three to eight years and their parents. To cater to the youngest members of this audience, the company’s locations feature a Toddler Zone, designed to provide a “safe haven” for smaller children so that parents can feel comfortable that their children are playing in a safe and secure environment. Many stores also offer Skytubes, a colourful mix of platforms, slides and tubes through which little ones can crawl and explore.

There is more to a Chuck E. Cheese location than just coin-op amusements, said Chism. “What is unique about the Chuck E. Cheese’s concept is that our business model centres on free entry. What you choose to spend and play is open to you. The token-operated games and the value yield for families is how we appeal to the masses.”

Today’s children are undoubtedly more “tech-savvy” than previous generations, Ward acknowledged. “They’re definitely more technologically advanced; they know how to do a lot of things that their parents can’t do on computers themselves. If you give them a mobile phone, they can operate it better than their parents most of the time!”

Ensuring that its stores are able to cater to this new audience, Chuck E. Cheese’s launched its first mobile app, Chuck E.’s Say Cheese!, this year. Once the app is downloaded, users can point their cameras at one of the many ‘Say Cheese Here!’ signs located around the store to take a picture of themselves alongside Chuck E., who pops up in one of several different poses. Pictures can then be shared via Facebook and Twitter or by email and can also be uploaded to Chuck E. Cheese’s website.



No photos are shared without an adult’s consent, however.

“The app is based on augmented reality and is our first attempt to drive a leading-edge technology in with our existing game packages,” said Chism.

The company has a “solid mix” of locations that includes both standalone stores and those that are more closely tied to retail and leisure developments. The company’s dedicated real estate team works to identify sites with strong potential. Chism, referring to locations that form part of a larger retail and entertainment destination, said that it is “wonderful” when Chuck E. Cheese’s is positioned alongside other family attractions.

“Whatever brings them to the retail centre will also bring people into Chuck E. Cheese’s. When possible, it is wonderful to be part of a retail centre and we have lots of store locations anchored in such centres.”

This business model is not solely being applied to the US, however. Since 1986, Chuck E. Cheese’s has been exploring international franchise opportunities in Latin America and the Middle East. The company signed six agreements last year to open 39 international stores over the next six years and one of international president Roger Cardinale’s key aims is to further develop the brand internationally by adding new stores in Asia, eastern Europe and Latin America.

“What we’re looking for from a CEC branding standpoint,” said Chism, “is to make sure that the same experience that you have in the US can take place in Guam or Saudi Arabia, for example, and we have identified some really wonderful franchise partners to carry the brand in those areas.

“I don’t think it is an overstatement to say that we will have a greater presence internationally in the coming years.”

In today’s economic climate, those occupying the family entertainment sector face competition for household disposable income that has, in many territories, come under pressure as a consequence of rising inflation and static wages.

Despite its prominent position, Chuck E. Cheese’s does not take its position within the marketplace for granted, Chism said.

“Our greatest competition is any activity that families want to engage in, whether that is visiting a public park or another family entertainment centre, but we don’t think that there is anything quite like the Chuck E. Cheese’s experience,” she said.

“We have a healthy respect for our competition and we’re working to stay nimble and be aware of what’s in the marketplace and how we can always serve our guests better.

“I would say that the outlook is quite positive and we’re excited about the future.”





Caving for everyone

The 'next big thing in adventure entertainment' says Christian Turford at Hangfast Climbing... But he may not be too biased with that statement for artificial caving systems as a new and stimulating experience have been recognised by the influential Centre Parcs family holiday village chain

In the next three years, each Centre Parcs will have a caving centre as well as a climbing wall. Hangfast Climbing is also building its first artificial caving system in France early next year and according to Turford, no fewer than four systems will go into Israel shortly.

So what are they? The artificial cave quite simply replicates a real cave but in a safe and controlled environment. In the same way that indoor climbing walls educate, inspire and excite a new generation of more ambitious and outgoing youngsters, the lure of subterranean adventures is proving irresistible.

"It makes caving more accessible to those who would otherwise not have any chance of participating in this sport," he said.

The purpose-built systems have emergency exits and can contain any of the Freedom Range of products which include emergency lighting, motion sensor lighting and sound effects and even access for the physically disabled. The company can also deliver artificial caves for rescue training.

"Most people ask 'will I fit?', but we develop a system with a main passageway to allow a caver as tall as 6ft 4ins (nearly 2m) and with a 44ins chest and 42ins waist. Unfortunately, caves are not suitable for everyone. Consideration has to be given to who can take part – just as you have to with any outdoor activity. Heart conditions, epilepsy and claustrophobia are among the conditions which would have to be refused entry."

The company has found that caving systems

work well in climbing and activity centres as well as shopping centres and also holiday parks such as Center Parcs. Climbing walls do not actually make very much money directly from climbers. "We have found through our own climbing centre it's the beginners courses and birthday parties that create profit margins. By adding a cave to a climbing centre you open yourself up to return party custom. Many people don't tend to have the same party two years in a row on the climbing wall, however they will come to the same place year after year if there is something new to do."

More commercial customers, like Center Parcs, are able to charge a premium for the caving experience and receive a heavy year-round footfall of participants. Hangfast predicts that they will have recouped the cost of the cave in the first year. "Soft play centres are now noticing the potential of caving systems; in essence they are a playground without boundaries and kids love them."

In terms of footprint the bespoke caves are all designed and built to order. Any space can accommodate a cave. Most are indoors in a room but they can be outdoors. Centre Parcs' caving adventure has a footprint of approximately 7m x 12m and Hangfast managed to fit 100 linear metres of cave in with room to spare.

Are they expensive? "We have two caving products. Bespoke, which is all hand crafted and a less costly molded system called CaveFast. This is a modular system consisting of standard off-the-shelf sections, straight, 90

degree turn, 45 degree turn and 'T' pieces. It is similar to a Scalextric set or individual pieces can be bought to create your own cave. Through the flange system they can interconnect CaveFast and bespoke sections such as its ball pool sumps to create a cheaper but just as exciting alternative to the bespoke systems. "This has opened up the market for us, allowing us to build affordable caves for charity and council-based clients and of course drastically undercut our competition. Our CaveFast cost £295 a section and our bespoke depends entirely on what the customer wants and the space they have.

"We also have a trailer cave product which is a bespoke caving system on a 7 x 2.1m trailer. This retails at around £30,000. We also do a smaller one at 4.8 x 2.1 made of CaveFast that costs around £20,000. Both contain a ball pool sump and boulderfield.

"We are also currently manufacturing our very first container cave which retails at around £25,000."





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Inflatables - changes in application

There is nothing new about an inflatable children's attraction – the traditional 'bouncy castle' is still just that; it is rather the breadth of its application which has changed, says Richard Taylor, one of the longest-serving suppliers in the market place

TAYLOR, who runs Bounceabouts Ltd., doesn't argue with the view that there may be as many as 100,000 inflatable devices currently operating globally, but they are no longer the staple of the travelling fairground. "The gambit is rather wider now. Traditional users are indeed the fairgrounds or carnivals, where a large slide and activity piece is usually seen alongside the mechanical rides and the hirers market, who bring the product to your doorstep.

"There is much more work these days in the corporate world, whether that be as part of team building or for promotional use where an inflatable structure or concept can often provide a low-cost method of increasing awareness. And of course a major market now is indoor play areas."

The British suppliers at one time dominated the world market for this type of attraction, but with competition coming in from China, the US and other areas of Europe, notably Romania and Spain, the supply chain became far more spread. The main difference between them all, he says, is quality, the type of artwork supplied and conformity to standards.



The world market is split 50-50 between North America and the rest of the world, with Europe the second-largest geographic area for inflatable devices. And the use to which they are put has expanded,

in that it is no longer just a case of 'bouncing around' on a structure as it was originally devised. Slides, activity areas, assault course, ball pools and other structures have expanded the choices for operators.

That has enabled the devices to get into fresh territories. The family entertainment area (FEC) is very much the speciality of Taylor's Bounceabouts. "I think the trend for inflatables now in an FEC is that they are more likely to be created as part of a themed area and as such more time and concentration is going into the design of rides. It is very much a bespoke area, with each operator seeking something 'different' for his location, but working it into the overall plans for his FEC, theming it to fit precisely."

The great benefit of inflatables is their simplicity of operation. The typical inflatable attraction now needs few operators and the main considerations are the installation and movement of the device, if it is not in a fixed environment in the first place. They must be inspected daily and the staffing depends on the age groups planning to use it and whether they want to use it at the same time. This calls for some discipline. The overall safety issues are important in many countries, particularly Western Europe. UK-based attractions, for example, must conform to EN14960, says Taylor, in its manufacture and from there it can be inspected annually "just as you would have an annual mechanical check on a car for a new certificate of safety and conformity to be issued."

The operator's main issue is his return on investment, but with an average life-span of six years, most rides from a reputable dealer will



give a fast return, arguably a better and faster return than many other amusement attractions. Most operators seek to reinvest earlier than the six-year cycle, rebranding the design after about three years as there will still be a good second-hand value. But with 'bouncers' costing as little as €1,200 for what Taylor calls "back garden inflatables" the investment is not high. The professional would probably go more for the three or four section multi-activity device with a slide, which can cost around €24,000.

The high throughput in a well-populated location is what gives the fast and high ROI, with five-minute slots for riders ranging from 10 a day to

20, depending on the size of the inflatable and the hours of operation.

Compared with the early days of the inflatable ride, the unit is far tougher and long-wearing now than it ever was. The improvements have come through examining newer fabrics and gradual fine-tuning of designs to promote durability. The use of sealed welded technology allows for new opportunities in the sports and promotional market and particularly in the range of children's boats and water balls.

This is very much the standard of the products now turned out by Taylor's Bounceabouts, a company which has been in the inflatables market since 1988 and which is therefore one of the pioneers. Richard Taylor himself has led the company for the past seven years, taking it on and building it up still more until today it has 20 employees making products sold to over 30 countries.

Service is a keyword for Bounceabouts. "You have to back up a product in terms of testing, repairing and amending. We are well set up to cater for this and it is part of the business on which we have concentrated."

A look at the Bounceabouts website (www.bounceabouts.com) will illustrate how a product can be custom-made from a 'back of the cigarette packet' scribble to professional drawings and specialist construction. Slides still take up about 50 per cent of the company's sales. "Interestingly, much of our business is additions to existing products. Customers may want an extra lane to a slide, or an extra climb-up, or perhaps some unique artwork or their logo adding; perhaps different colours, a new net for shade – we can do virtually anything which makes us very versatile and adaptable."

Bespoke products, total one-offs specially made for customers, are the bulk of the business, however. "We are trying to be a one-stop-shop for anything inflatable," said Taylor. This, and the flexibility and versatility of the company, underlined by owner-management (no middle-management to get in the way), the best materials, individual design, hand-painted bespoke artwork, high service and a good range of stock with the ability to ship world-wide, add up to why Bounceabouts have outlasted just about everyone in the business of inflatables.

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Realising imagination

On June 17 the children of Kuwait could play their 'pretend' games against the most realistic of settings... A policeman? No problem. A bus driver? No problem; also no problem to shop in a supermarket, run a newspaper, operate an airline check-in desk or a myriad of other 'grown-up' functions

KIDZANIA opened its doors for its latest installation on June 17. Kuwait joined similar kids' 'cities' in Mexico, Japan, Indonesia, Portugal, the United Arab Emirates, South Korea, Malaysia, Chile and Thailand. Altogether there are now 13 locations in nine countries and more are coming in Egypt, Brazil, India, Turkey, Saudi Arabia, Singapore, Russia, the Philippines, Qatar, the United Kingdom and the US.

What's behind KidZania is the brainchild of Xavier Lopez Ancona, who built his first KidZania in Mexico City in 1999. The key is interaction; the hands-on experience of play in an adult environment, things which normally children can only play-act and imagine, but KidZania puts the hardware into their hands.

For children aged four to 14, KidZania offers 80,000 sq.ft of child-sized activities within a small city. There are 60 different careers they can try out and learn the inner-workings of a small community and the concept of managing money. The experiences are ultra-realistic and it is all adult-free.

Check the child in and then it's a case of 'parents get lost!' as the youngsters are immersed in an artist's studio, or a hairdressing

salon, or a bank's counter. "The child becomes empowered," said Michelle Spring Fajeau, who works for Zebra Partners on KidZania media relations. "It gives them the confidence to be the best selves and inspiration to be great global citizens."

Fajeau introduced us to Cammie Dunaway, global CMO and US president of KidZania, who explained that in order to provide the most realistic environments for the children's 'adult play' the company works with 500 brand sponsors to authenticate the content. They include American Airlines, Avis, Baskin Robbins, Chevrolet, Clinique, Coca-Cola, Domino's, Duracell, Honda, McDonald's, Nestle, Pizza Hut, Sears, Seiko, Toyota and Walmart.

Role-playing is a timeless and universal childhood activity

"Role-playing is a timeless and universal childhood activity. In fact, mankind's oldest known toy is a doll's head from 4,000 BC found in Pantelleria, Italy. Even then, children were imitating adults through play. In every country where we open a KidZania, we see that kids



love participating in real-world activities like fighting fires, driving cars and opening bank accounts. KidZania believes that hands-on play is the best way for children to learn new skills and be inspired to pursue their life's dreams."

It begins from the moment the family arrives at the door. At Dubai, for example, on the top floor of the Dubai Mall, the KidZania entrance is a scaled-down airport check-in desk, sponsored by Emirates, beneath the huge overhanging fuselage of a jet with Emirates livery. That's where the kids check in to KidZania and say goodbye to the parents.

They then enter their own world, a scaled-down city of adult occupations, and play out the roles of their choice.

That KidZania is yards away from Sega Republic, another kind of FEC, this time originally designed for older children. How do the two co-relate, if at all? Will one fight for the same 'spend' as the other? "I cannot comment on the performance of Sega Republic,

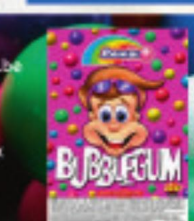
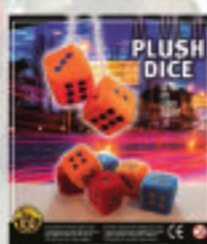


Cammie Dunaway, global CMO and US president of KidZania



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Case study

though I did enjoy riding the rides there! For KidZania, Dubai has done exceptionally well, far exceeding our initial attendance forecasts. I think when multiple entertainment venues come together in a place like the Dubai Mall it just makes it a more attractive destination for families to visit often."

At the business end of KidZania, three of the locations are owned by the company itself, all in Mexico. There are another nine which the company has developed with franchisees. They include some big names: Emaar in the UAE, Alshaya in Kuwait, Khazanah in Kuala Lumpur, all companies with a long track record of dedication to customer service. "They bring the local market knowledge that makes KidZania so authentic," said Dunaway. The business model is two-fold. First, KidZania is an FEC, but at the same time it acts as a marketing media for brands. Each activity is sponsored by a relevant brand that knows how to bring to life authentic career experiences. For example, kids can customise their own Honda car on a manufacturing line, sit in the cockpit of an American Airlines simulated plane or produce a radio show in a studio sponsored by a local broadcaster. "This creates a profitable business which is a true win/win/win," says Dunaway.

KidZania is no longer alone in the children's role-playing FEC business. There is Minipolis, an Austrian company with a similar style, which is starting to spread its operations into other regions, notably the Middle East. Is the market place for this type of location becoming crowded? "There have been copy-cats which have tried to replicate the success of KidZania," said Dunaway. "So far, none have been able to do so. While our concept may seem simple, the attention to detail we put into all aspects of the experience from the educational components of our content to the theming of the city facades really makes us stand apart. I think that attention to detail in our execution, plus the innate appeal of the concept itself, is what has led us to be such a global phenomenon."

Setting up an operation such as KidZania is not going to be inexpensive. That in itself will limit the expansion of the company in terms of the number of outlets. Is that finite? "At the



moment our concept is best suited to dense metropolitan areas that have a catchment of 700,000 children. Our vision, however, is to bring the joy of KidZania to all children. That might take the form of a smaller footprint or more online activities. We have lots of ideas that we are exploring. Every child should be able to experience what we do!"

The hint, therefore, is of smaller locations with added technology. Such a cut-down version of a highly successful obvious-appeal niche market would bring KidZania within the reach of many more operators, many more locations and many, many more children.



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